

This report is being submitted to fulfill the requirements of RFP #2012-65

Detailed Fact-base: Post-Secondary Online Expansion in Florida

November 16, 2012



THE PARTHENON GROUP
Boston • London • Mumbai • San Francisco

Detailed Fact Base

Strategy Detail

National Post-Secondary Online Market

Examples of Innovative Models

Florida Persistence

Florida Online Enrollments

Florida Online Programs

Florida Tuition and Fees

Florida Employment

Florida Virtual Campus

Accreditation Detail

Stakeholder Interviews

Strategy 1: Institutions develop online offerings of their own accord, driving innovation in a way that best fits each school's mission



<div> <div>←</div> <div>Each institution may choose to partner with other SUS/FCS institutions or a private partner</div> <div>→</div> </div>					
<ul style="list-style-type: none"> Local faculty drive program identification and design Institution-level best practices Limited statewide coordination of labor-market needs 	<ul style="list-style-type: none"> Local marketing and lead generation 40+ brands and value propositions state-wide 	<ul style="list-style-type: none"> Shares student services with onsite/hybrid Limited experiential data-sets Local career / job placement services 	<ul style="list-style-type: none"> Driven by faculty and classroom availability Course availability and start dates driven by institutional calendar 	<ul style="list-style-type: none"> Shared online/onsite faculty Class sizes similar to onsite 	<ul style="list-style-type: none"> Each institution chooses its own LMS, ERP, and SIS Local data analytics FLVC continues to manage statewide computer-assisted advising system

Strategy 2: Coordinating body (e.g., FLVC/BoG/FL DoE) coordinates development of complementary course and degree program offerings across the system



← Participating Institutions and/or Coordinating Body may choose to partner with a private partner →

- | | | | | | |
|---|---|---|--|--|---|
| <ul style="list-style-type: none"> • Coordinated program offerings • Individual institutions design courses within given parameters • Coordination of labor-market needs through coordinating body or an institution | <ul style="list-style-type: none"> • Marketing and lead generation is coordinated centrally and executed by coordinating body or an institution • Prospective candidates referred to institution admissions offices | <ul style="list-style-type: none"> • Student support is delivered centrally by coordinating body or an institution • Job placement supports are developed by collaboration of institutions and delivered by coordinating body or an institution | <ul style="list-style-type: none"> • Centrally coordinated to maximize course utilization | <ul style="list-style-type: none"> • Instruction is delivered by individual institution professors and available state-wide | <ul style="list-style-type: none"> • Individual institutions use their own LMS, ERP, and SIS • Central data analytics team (at coordinating body or an institution) provides analytic support to institutions |
|---|---|---|--|--|---|

Strategy 3: Lead institution(s) develops and offers new models across the system



Lead institution may choose to partner with other SUS/FCS institutions and/or a private partner

- Lead institution(s) is selected through a competitive grant process to develop and deliver new online programs within grant parameters
- Lead institution(s) may choose to partner with SUS/FCS, other institutions, or a private partner
- Lead institution markets state-wide
- Enrollment management handled by lead institution
- Student supports are developed and coordinated at the lead institution or through a partner organization
- Job placement supports are developed lead institution
- Coordinated by lead institution to meet parameters of grant
- Instruction could be delivered by the lead institution or through partner organization
- Utilize current faculty and new teaching staff
- All data analytics are overseen by the lead institution

Strategy 4: New online institution is created to focus exclusively on the development of new models

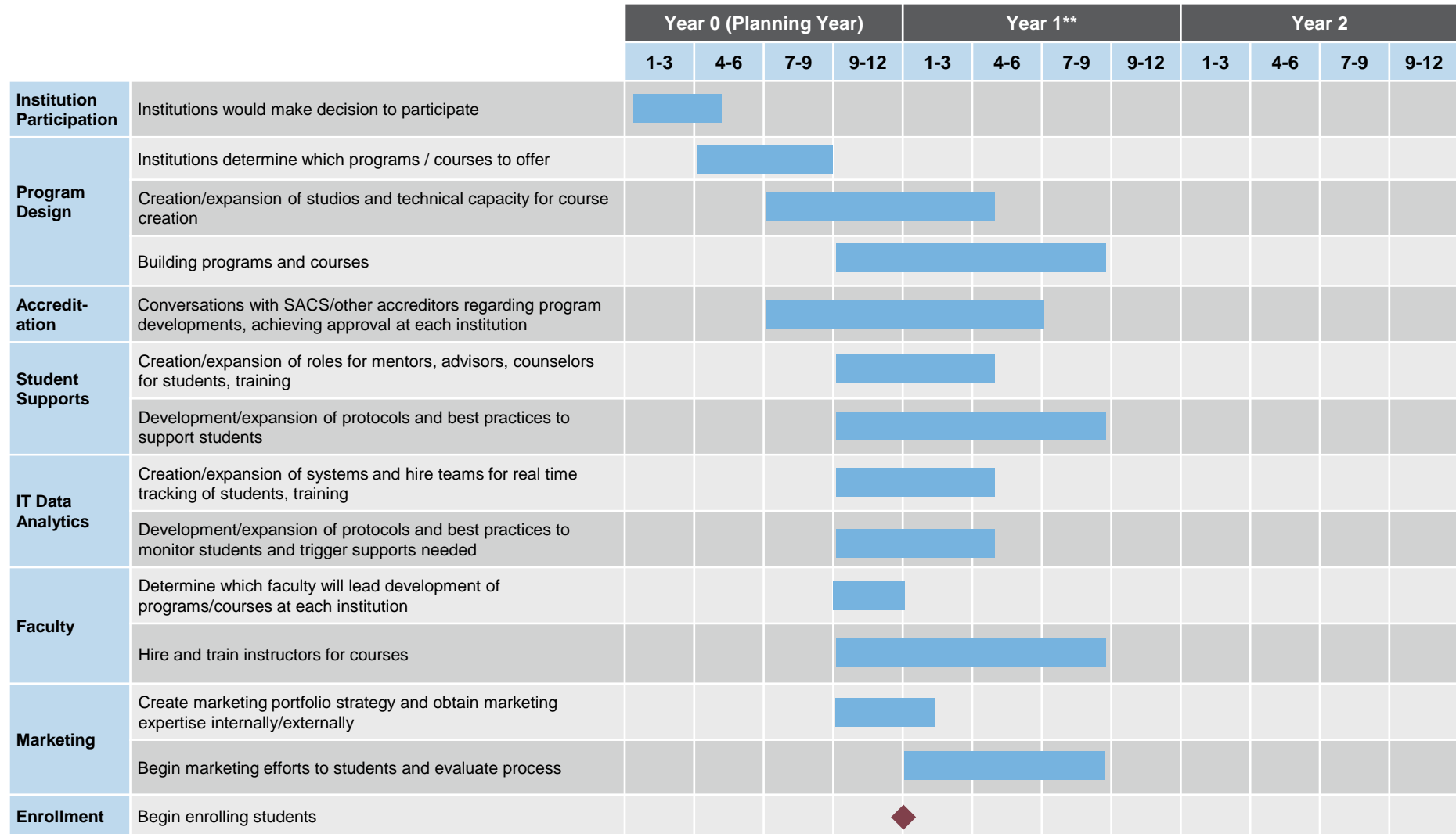


← New online institution may choose to partner with other SUS/FCS institutions and/or a private partner →

- New online institution develops innovative programs to offer system-wide
- Course development occurs at the new institution, coordinated with labor-market needs state-wide
- New brand created for Florida online institution
- Inquiry and lead generation is coordinated by the new institution
- Utilize best practices of data-driven student support services
- Designed to meet needs of 100% online target student
- Flexible starts
- Synchronous and asynchronous content
- Non-research faculty deliver all online content
- Designed and built to meet the needs of the 100% online student

Strategy Detail

Timeline – Strategy 1 Institution-by-Institution*



Strategy Detail

Timeline – Strategy 2 Institutional Coordination

		Year 0 (Planning Year)				Year 1				Year 2			
		1-3	4-6	7-9	9-12	1-3	4-6	7-9	9-12	1-3	4-6	7-9	9-12
Create Coordinating Body	Empower coordinating body and ensure leadership is aligned with both state and institution objectives												
	Hire initial staff, finalize role of coordinating body												
Obtaining Funding	Determine funding amounts for coordinating body and add to state appropriations budget												
Legislation	Pass legislation to empower and fund coordinating body; allow for adjustment to tuition												
Program Design	Determine which programs/courses to offer, and which institution should offer them												
	Creation/expansion of studios and technical capacity for course creation												
	Building programs and courses												
Accredit-ation	Conversations with SACS/other accreditors regarding program developments, achieving approval												
Student Supports	Creation of roles for mentors, advisors, counselors for students												
	Development of protocols and best practices to support students												
IT Data Analytics	Creation of systems and hire teams for real time tracking of students, training												
	Development of protocols and best practices to monitor students and trigger supports needed												
Faculty	Determine which faculty from which institutions will lead development of courses												
	Hire and train instructors for courses												
Marketing	Create marketing portfolio strategy and obtain marketing expertise internally/externally												
	Begin marketing efforts to students and evaluate process												
Enrollment	Begin enrolling students												

Strategy Detail

Timeline – Strategy 3 Lead Institution

		Year 0 (Planning Year)				Year 1				Year 2			
		1-3	4-6	7-9	9-12	1-3	4-6	7-9	9-12	1-3	4-6	7-9	9-12
Selecting Lead Institution	RFP for Lead Institution put out												
	Proposals responded to, proposals reviewed, institution selected												
Obtaining Funding	Determine funding amounts and add to state appropriations budget												
Legislation	Pass legislation to fund grant to lead institution and allow for adjustment to tuition												
Program Design	Determine which programs / courses to offer												
	Creation/expansion of studios and technical capacity for course creation												
	Building programs and courses												
Accreditation	Conversations with SACS/other accreditors regarding program developments, achieving approval												
Student Supports	Creation of roles for mentors, advisors, counselors for students, training												
	Development of protocols and best practices to support students												
IT Data Analytics	Creation of systems and hire teams for real time tracking of students, training												
	Development of protocols and best practices to monitor students and trigger supports needed												
Faculty	Determine which faculty will lead development of programs/ courses, potentially from outside Lead Institution												
	Hire and train instructors for courses												
Marketing	Create marketing portfolio strategy and obtain marketing expertise internally/externally												
	Begin marketing efforts to students and evaluate process												
Enrollment	Begin enrolling students												

Strategy Detail

Timeline – Strategy 4 New Institution

		Year 0 (Planning Year)				Year 1				Year 2			
		1-3	4-6	7-9	9-12	1-3	4-6	7-9	9-12	1-3	4-6	7-9	9-12
Build New Institution	Determine goals, specifications for new university												
	Construct/repurpose physical and technological facilities												
	Hire president and lead staff of new institution												
Obtaining Funding	Determine funding amounts and add to state appropriations budget												
Legislation	Pass legislation to create new institution												
Program Design	Determine which programs / courses to offer												
	Creation/expansion of studios and technical capacity for course creation												
	Building programs and courses												
Accredit-ation	Conversations with SACS/other accreditors regarding program developments, achieving approval												
Student Supports	Creation of roles for mentors, advisors, counselors for students												
	Development of protocols and best practices to support students												
IT Data Analytics	Creation of systems and hire teams for real time tracking of students, training												
	Development of protocols and best practices to monitor students and trigger supports needed												
Faculty	Hire faculty to create programs												
	Hire and train instructors for courses												
Marketing	Create marketing portfolio strategy and obtain marketing expertise internally/externally, and to create brand												
	Begin marketing efforts to students and evaluate process												
Enrollment	Begin enrolling students												



Strategies will necessitate levels of initial investment ranging from ~\$30-70M

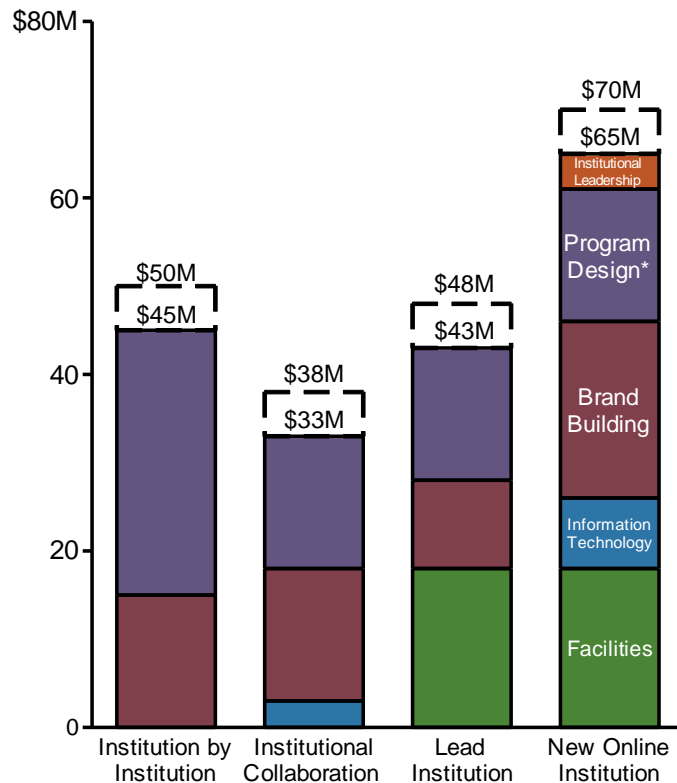
Start Up Expenditure

Recurring Expenditure

System Volume

System Expenditure

Start-Up Expenditures Associated with Each Approach to Online Expansion



Benchmarks

Over the past 10 years, a number of online institutions have been started or built from existing institutions; Figures cited by these institutions about their initial investments inform this model

- **Overall:** WGU needed \$40-\$50M over the first four years of its existence for start-up related expenditure
- **Building:** WGU required a building for 400 student support professionals. Industry standards suggest call centers require 150 sq. ft per person at an estimated \$250 per square foot in Florida
- **Information Technology:** UCAL invested \$4.3M to build a state of the art Learning Management System. Initial investment in ERP systems range from \$1-3M; student information systems can necessitate an additional \$1-2M of upfront investment.
- **Brand Building:** WGU requested \$10-\$15M for brand building in Florida. SNHU spent \$15M on marketing when they decided to take programs national
- **Program Design:** Program expenditures vary tremendously across institutions. Best-in-class course design expenditures estimated at \$5K-\$10K per unique course. Degree programs require 10-40 unique courses. Course materials can be leveraged for both credit based and competency based programs
- **Institutional Leadership:** A new Institution will require an Institution head and a small staff of 10-15 highly skilled individuals to create the basic infrastructure needed to run a post-secondary institution and gain accreditation

* Program design will take place over the 10 year time period

Note: Dotted lines represent range of total start-up expenditure; Institutional leadership becomes a recurring expenditure as FTEs begin to enroll; ERP: enterprise resource planning, LMS: learning management system, SIS: student information system

Source: ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July-November 2012

Strategy Detail

Start-Up Expenditure Assumptions

Start Up Expenditure

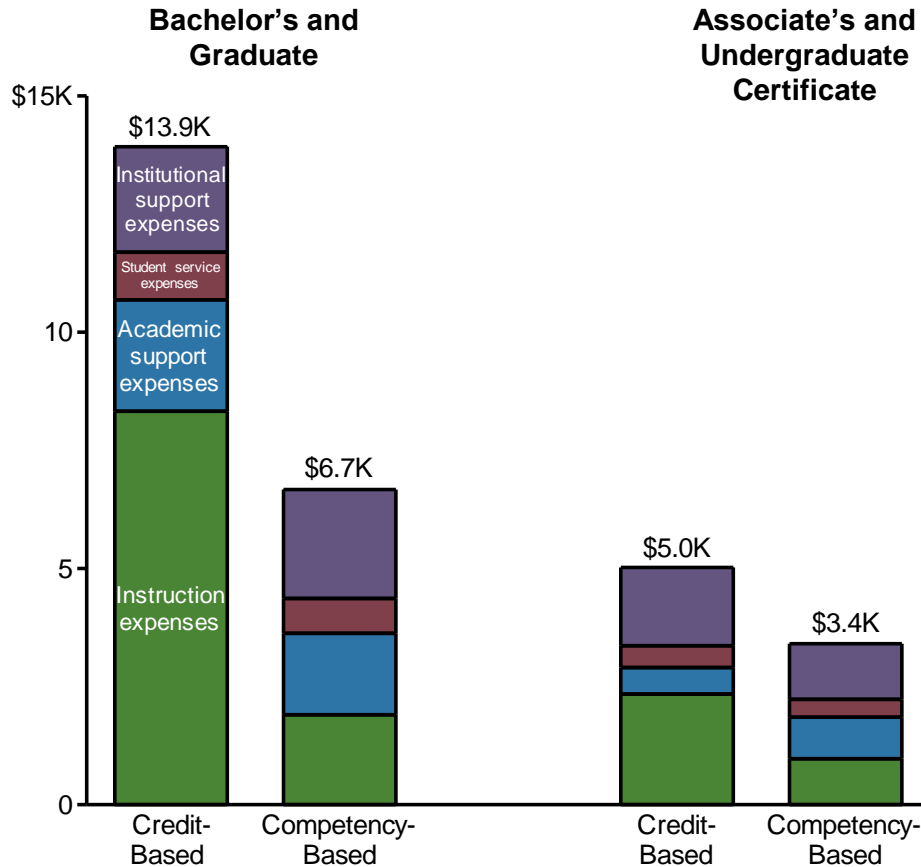
Recurring Expenditure

System Volume

System Expenditure

	Institution by Institution	Institutional Collaboration	Lead Institution(s)	New Online Institution
Facilities Benchmark: WGU facility holds 400 people (\$18M)	<ul style="list-style-type: none"> None needed 	<ul style="list-style-type: none"> None needed 	<ul style="list-style-type: none"> New building required to house additional support service professionals (\$18M) 	<ul style="list-style-type: none"> New building required to house additional support service professionals (\$18M)
Information Technology Benchmark: UCAL needed \$4.3M to build new LMS	<ul style="list-style-type: none"> Leverage existing institutions infrastructure, no additional investment required 	<ul style="list-style-type: none"> Leverage existing infrastructure, reducing start-up expenditures by 40% (\$3M) 	<ul style="list-style-type: none"> Leverage existing institutions infrastructure, no additional investment required 	<ul style="list-style-type: none"> Build out new LMS (\$5M), ERP (\$2M), SIS (\$1M) (\$8M Total)
Brand Building Benchmark: WGU brand building efforts (\$20M)	<ul style="list-style-type: none"> Current brands are leveraged, but splitting the spend between institutions reduces marketing effectiveness (\$15M) 	<ul style="list-style-type: none"> Current brands are leveraged, but need to strengthen brand across institutions (\$15M) 	<ul style="list-style-type: none"> Leverage existing brand, reducing marketing expenditures by 50% (\$10M) 	<ul style="list-style-type: none"> Need to create new brand for new online institution (\$20M)
Program Design Benchmark: Estimated \$10K per course; Average \$300K for a full degree program	<ul style="list-style-type: none"> 100 new programs created for both credit-based and competency-based programs across all participating institutions; high duplicative program creation increases program design expenditures (\$30M) 	<ul style="list-style-type: none"> 50 new programs created for both credit-based and competency-based programs (\$15M) 	<ul style="list-style-type: none"> 50 new programs created for both credit-based and competency-based programs (\$15M) 	<ul style="list-style-type: none"> 50 new programs created for both credit-based and competency-based programs (\$15M)
Institutional Leadership Benchmark: Estimated need	<ul style="list-style-type: none"> None needed 	<ul style="list-style-type: none"> None needed 	<ul style="list-style-type: none"> None needed 	<ul style="list-style-type: none"> Institution head and 10-15 highly skilled staff needed to implement basic strategy and acquire accreditation (\$4M for first 2 years)

Recurring Expenditures per FTE for Online Instruction, by Degree and Program Type



Key Assumptions

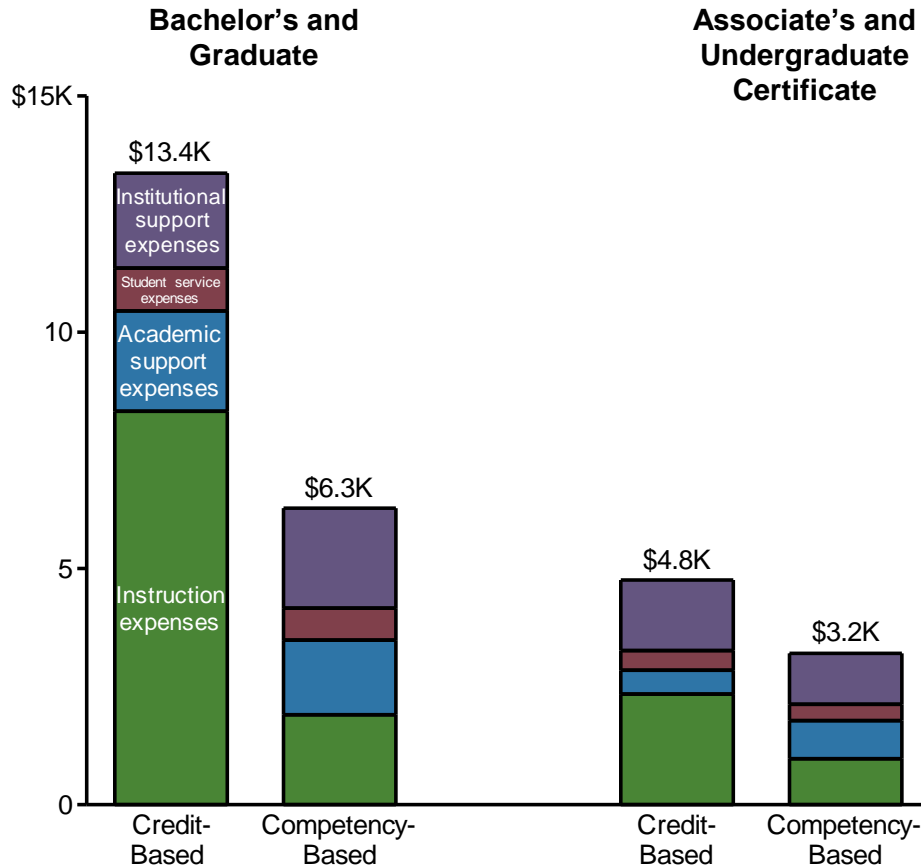
Bachelor's and Graduate

- Credit-Based Programs
 - Benchmarked on current average Florida SUS expenditures per FTE excluding research, public services and other non core expenses
- Competency-Based Programs
 - Instructional expenses are based on WGU expenditures per FTE; Support expenditures are 20% higher than WGU expenditures due to lack of scale and inefficiency of duplicating business processes across institutions

Associate's and Undergraduate Certificate

- Credit-Based Programs
 - Benchmarked on current average FCS expenditures per FTE excluding research, public services and other non core expenses
- Competency-Based Programs
 - Instructional expenses based on SNHU's Competency AS program estimated expenditures per FTE; Support expenditures are 20% higher than SNHU's expenditures due to lack of scale and inefficiency of duplicating business processes across institutions

Recurring Expenditures per FTE for
Online Instruction, by Degree and Program Type



Key Assumptions

Bachelor's and Graduate

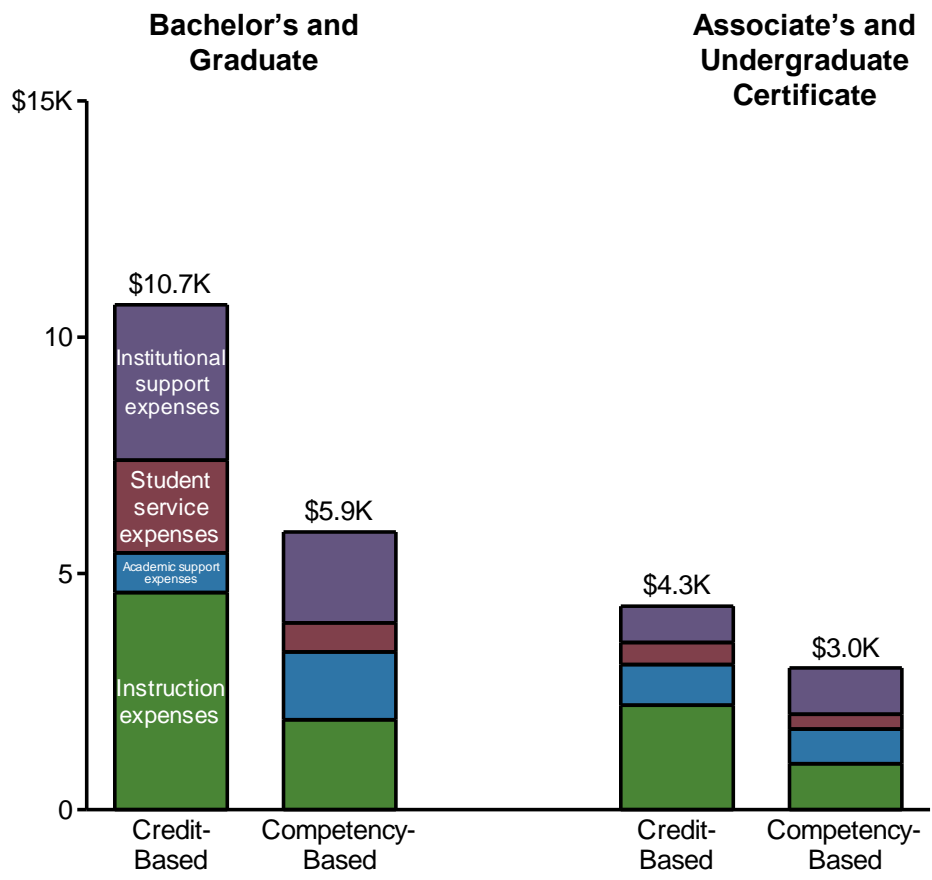
- Credit-Based Programs
 - Instructional expenses benchmarked on current average Florida SUS costs per FTE; Supports costs are 10% lower than SUS costs due to scale efficiencies and improved centralized business processes
- Competency-Based Programs
 - Instructional expenses are based on WGU costs per FTE; Support costs are 10% higher than WGU costs due to inefficiency of coordinating business processes across institutions

Associate's and Undergraduate Certificate

- Credit-Based Programs
 - Instructional expenses benchmarked on current average Florida FCS costs per FTE; Supports costs are 10% lower than FCSS costs due to scale efficiencies and improved centralized business processes
- Competency-Based Programs
 - Instructional expenses based on SNHU's Competency AS program estimated costs per FTE; Support costs are 10% higher than SNHU's costs due to inefficiency of coordinating business processes across institutions

Start Up Expenditure
Recurring Expenditure
System Volume
System Expenditure

Recurring Expenditures per FTE for Online Instruction, by Degree and Program Type



Key Assumptions

Bachelor's and Graduate

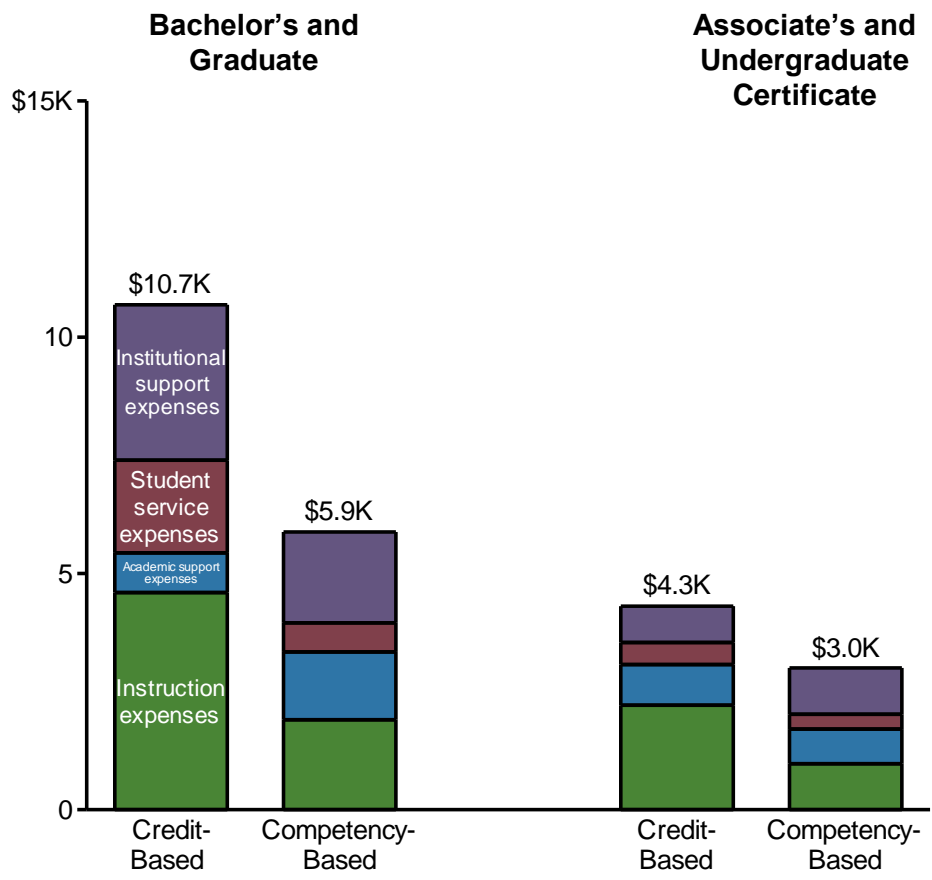
- Credit-Based Programs
 - Centralized structure enables lead institution to reach target benchmarked on SNHUs costs per FTE
- Competency-Based Programs
 - Centralized structure enables lead institution to reach target benchmarked on WGU costs per FTE

Associate's and Undergraduate Certificate

- Credit-Based Programs
 - Centralized structure enables lead institution to reach target benchmarked on Rio Salado costs per FTE
- Competency-Based Programs
 - Centralized structure enables lead institution to reach target benchmarked on SNHU's Competency AS program's estimated costs per FTE

Start Up Expenditure
Recurring Expenditure
System Volume
System Expenditure

Recurring Expenditures per FTE for Online Instruction, by Degree and Program Type



Key Assumptions

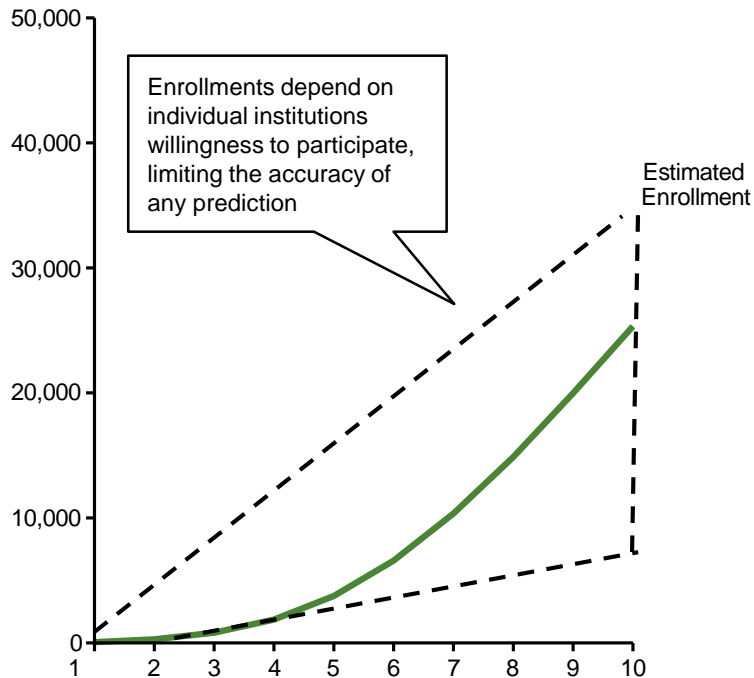
Bachelor's and Graduate

- Credit-Based Programs
 - Centralized structure enables new institution to reach target benchmarked on SNHUs costs per FTE
- Competency-Based Programs
 - Centralized structure enables new institution to reach target benchmarked on WGU costs per FTE

Associate's and Undergraduate Certificate

- Credit-Based Programs
 - Centralized structure enables new institution to reach target benchmarked on Rio Salado costs per FTE
- Competency-Based Programs
 - Centralized structure enables new institution to reach target benchmarked on SNHU's Competency AS program's estimated costs per FTE

1 Institution by Institution Enrollment Projection (FTE)



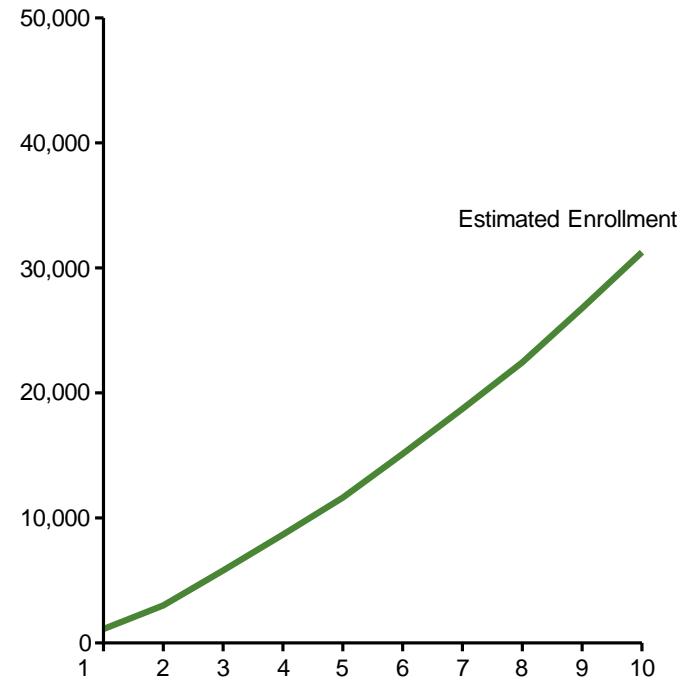
Programs Added Each Year

5	10	15	20	25	25	25	25	25	25
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Institution by Institution

Benchmark: Enrollment ramp will begin slowly as institutions gradually opt to participate. By year 6, program creation will begin to level out at 25 programs per year. Benchmarks indicate roughly 5 years ramp for a program to reach maturity at 500 in both credit- and competency-based programs

2 Institutional Collaboration Enrollment Projection (FTE)



Percent Penetration

0.3%	0.6%	1.0%	1.3%	1.6%	2.0%	2.3%	2.6%	3.0%	3.3%
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Institutional Collaboration

Benchmark: The Kentucky Community and Technical College System has fundamentally centralized control and development of new innovative online programs. The KCTCS has reached 1,000 enrollments by year 3 of their Kentucky On Demand project which now accounts 1% of total enrollments in the system

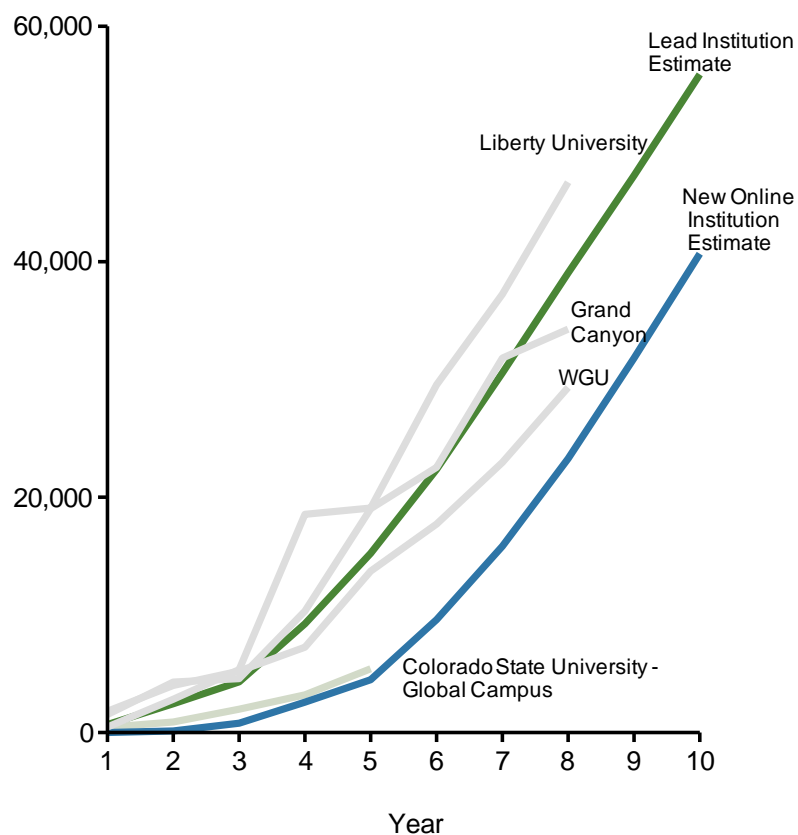
Strategy Detail

System Volume – Enrollment Projections and Benchmarks

3

4

Lead Institution and New Online Institution Enrollment Projections (FTE)



Methodology

- **Benchmarks:** Over the past 10 years a number of institutions have transformed into online universities and experienced substantial enrollment growth
- **Lead Institution:** Enrollment projection represents the average of the enrollment growth of three comparable institutions
- **New Online Institution:** Enrollment growth is assumed to be 2-3 years behind comparable institutions average due to brand building needs, infrastructure requirements, and accreditation time frame; WGU went through a similarly slow enrollment ramp-up as it sought accreditation and built brand awareness. Colorado State University – Global Campus is currently experiencing similar growth

Strategy Detail

System Volume – Total Volume Estimates

New Admit Growth										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Institution by Institution	120	440	1,160	2,480	4,800	8,000	12,000	16,600	21,600	26,600
Institutional Collaboration	1,989	4,097	7,034	9,418	11,940	15,372	18,209	21,201	25,197	28,548
Lead Institution	1,222	3,558	4,846	11,554	16,575	22,332	29,436	35,307	40,603	46,693
New Online Institution	0	240	1,222	3,558	4,846	11,554	16,575	22,332	29,436	35,307

Enrollments										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Institution by Institution	80	345	987	2,242	4,503	7,900	12,415	17,853	23,979	30,401
Institutional Collaboration	1,333	3,608	6,970	10,414	13,973	18,182	22,507	26,980	32,192	37,564
Lead Institution	819	2,940	5,172	11,086	18,275	26,825	36,663	46,857	56,786	67,082
New Online Institution	0	163	948	3,096	5,380	11,505	18,996	27,927	38,170	48,806

FTE Enrollments										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Institution by Institution	67	288	823	1,868	3,752	6,584	10,345	14,877	19,983	25,334
Institutional Collaboration	1,111	3,006	5,809	8,679	11,644	15,151	18,756	22,483	26,827	31,303
Lead Institution	682	2,450	4,310	9,238	15,229	22,354	30,552	39,048	47,322	55,902
New Online Institution	0	136	790	2,580	4,484	9,588	15,830	23,273	31,809	40,672

Completions										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Institution by Institution	8	45	162	415	901	1,710	2,905	4,435	6,243	8,233
Institutional Collaboration	129	547	1,476	2,544	3,761	4,973	6,353	7,910	9,467	11,223
Lead Institution	79	407	1,112	2,328	4,091	7,071	10,028	13,497	17,283	20,896
New Online Institution	0	16	117	481	1,178	2,464	4,329	7,505	10,642	14,324

Note: 1.2 Enrollments per FTE benchmarked against national average

Source: IPEDS; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Strategy Detail

System Volume – Enrollment Projections by Degree Level

Institution by Institution										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	8	29	75	161	312	520	780	1,079	1,404	1,729
Associate's	18	75	207	459	906	1,560	2,400	3,390	4,485	5,610
Bachelor's	45	199	584	1,349	2,742	4,873	7,763	11,288	15,300	19,552
Master's	10	43	121	273	543	947	1,472	2,096	2,790	3,510
Total	80	345	987	2,242	4,503	7,900	12,415	17,853	23,979	30,401
Institutional Collaboration										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	129	268	464	626	800	1,038	1,238	1,452	1,739	1,984
Associate's	298	771	1,393	2,009	2,619	3,399	4,178	4,952	5,919	6,892
Bachelor's	746	2,110	4,276	6,547	8,945	11,669	14,526	17,543	20,931	24,487
Master's	159	458	837	1,232	1,608	2,076	2,564	3,032	3,604	4,201
Total	1,333	3,602	6,957	10,395	13,948	18,149	22,467	26,933	32,137	37,500
Lead Institution										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	79	235	325	786	1,144	1,563	2,090	2,542	2,964	3,455
Associate's	183	638	1,039	2,238	3,677	5,162	7,009	8,856	10,567	12,433
Bachelor's	458	1,700	3,175	6,773	11,257	17,018	23,400	30,185	36,979	43,858
Master's	98	367	634	1,289	2,198	3,082	4,164	5,274	6,276	7,336
Total	819	2,930	5,152	11,043	18,207	26,731	36,537	46,701	56,603	65,749
New Online Institution										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	0	16	82	242	334	809	1,177	1,608	2,149	2,613
Associate's	0	37	210	667	1,091	2,338	3,852	5,406	7,337	9,271
Bachelor's	0	91	541	1,809	3,300	7,030	11,697	17,730	24,384	31,474
Master's	0	19	116	378	655	1,328	2,270	3,183	4,300	5,448
Total	0	162	944	3,084	5,360	11,462	18,927	27,832	38,043	47,801

System Volume – FTE Enrollment Projections by Degree Level

Start Up Expenditure

Recurring Expenditure

System Volume

System Expenditure

Institution by Institution										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	7	24	63	134	260	433	650	899	1,170	1,441
Associate's	15	63	173	383	755	1,300	2,000	2,825	3,738	4,675
Bachelor's	38	166	487	1,124	2,285	4,061	6,469	9,406	12,750	16,293
Master's	8	36	101	227	452	789	1,227	1,747	2,325	2,925
Total	67	288	823	1,868	3,752	6,584	10,345	14,877	19,983	25,334
Institutional Collaboration										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	108	224	387	522	667	865	1,032	1,210	1,449	1,653
Associate's	249	643	1,161	1,674	2,183	2,833	3,482	4,126	4,933	5,744
Bachelor's	622	1,758	3,564	5,456	7,454	9,724	12,105	14,619	17,442	20,405
Master's	133	382	697	1,027	1,340	1,730	2,137	2,527	3,003	3,501
Total	1,111	3,001	5,797	8,662	11,623	15,124	18,723	22,444	26,781	31,250
Lead Institution										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	66	196	271	655	953	1,303	1,742	2,118	2,470	2,879
Associate's	153	532	866	1,865	3,064	4,301	5,841	7,380	8,806	10,361
Bachelor's	382	1,417	2,646	5,645	9,380	14,182	19,500	25,154	30,816	36,548
Master's	81	306	528	1,074	1,832	2,568	3,470	4,395	5,230	6,113
Total	682	2,441	4,294	9,203	15,172	22,275	30,447	38,918	47,169	54,791
New Online Institution										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	0	13	68	202	279	674	981	1,340	1,791	2,177
Associate's	0	31	175	556	909	1,949	3,210	4,505	6,114	7,726
Bachelor's	0	76	451	1,508	2,750	5,858	9,747	14,775	20,320	26,228
Master's	0	16	97	315	546	1,107	1,892	2,653	3,583	4,540
Total	0	135	787	2,570	4,467	9,552	15,772	23,193	31,703	39,834

Strategy Detail

System Volume – Completion Projections by Degree Level

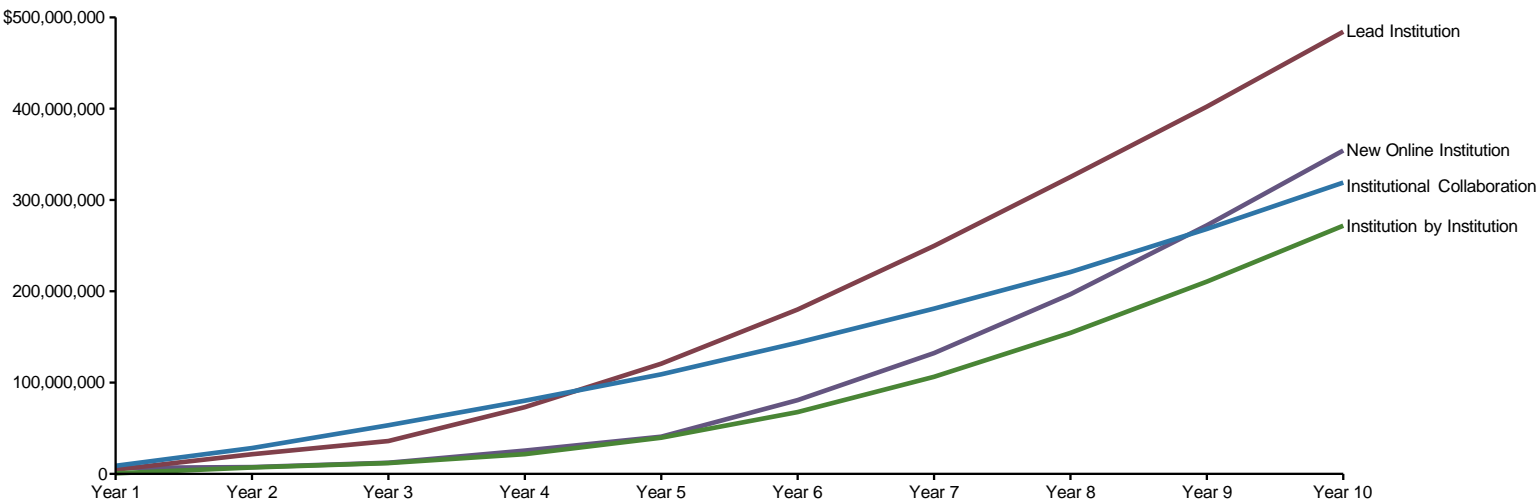
Institution by Institution										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	8	29	75	161	312	520	780	1,079	1,404	1,729
Associate's	0	9	33	87	186	360	600	900	1,245	1,620
Bachelor's	0	0	25	93	245	523	1,013	1,688	2,531	3,502
Master's	0	8	28	74	159	307	512	768	1,062	1,382
Total	8	45	162	415	901	1,710	2,905	4,435	6,243	8,233
Institutional Collaboration										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	129	268	464	626	800	1,038	1,238	1,452	1,739	1,984
Associate's	0	151	317	554	757	978	1,283	1,549	1,838	2,225
Bachelor's	0	0	428	899	1,574	2,150	2,779	3,647	4,404	5,226
Master's	0	128	267	464	629	808	1,053	1,262	1,487	1,788
Total	129	547	1,473	2,539	3,753	4,964	6,341	7,896	9,450	11,203
Lead Institution										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	79	235	325	786	1,144	1,563	2,090	2,542	2,964	3,455
Associate's	0	93	283	401	992	1,477	2,063	2,819	3,502	4,168
Bachelor's	0	0	268	812	1,150	2,848	4,242	5,933	8,114	10,093
Master's	0	79	236	330	806	1,183	1,632	2,202	2,703	3,180
Total	79	407	1,107	2,320	4,072	7,044	9,991	13,446	17,221	20,824
New Online Institution										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Undergraduate Certificate	0	16	82	242	334	809	1,177	1,608	2,149	2,613
Associate's	0	0	19	101	305	432	1,068	1,587	2,215	3,022
Bachelor's	0	0	0	55	290	877	1,240	3,070	4,569	6,384
Master's	0	0	16	83	248	346	845	1,240	1,710	2,305
Total	0	16	117	479	1,172	2,456	4,310	7,477	10,603	14,272

Strategy Detail

System Expenditure – Total Expenditure Projections

Start Up Expenditure
Recurring Expenditure
System Volume
System Expenditure

Total Expenditure by Strategy, 10 Year Forecast



Total Expenditure (000's)										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Institution by Institution	\$559	\$6,986	\$11,826	\$21,579	\$39,641	\$67,708	\$106,315	\$154,448	\$210,613	\$271,806
Institutional Collaboration	\$8,823	\$28,248	\$53,235	\$80,115	\$109,042	\$143,712	\$181,004	\$221,076	\$268,252	\$318,990
Lead Institution	\$4,637	\$21,562	\$35,961	\$73,103	\$120,675	\$180,031	\$249,683	\$325,209	\$402,262	\$484,261
New Online Institution	\$6,500	\$7,442	\$12,139	\$25,455	\$40,738	\$80,752	\$132,272	\$196,788	\$272,237	\$354,204

Strategy Detail

Revenue from Tuition and Fees – Assumptions and Methodology

Tuition and Fee Assumptions

General Assumptions

Growth Rate	
Annual Growth Rate	2%

Population Mix	
% In-State	90%
% Out-of-State	10%

Methodology

In State Benchmarks:

- Credit-based programs are benchmarked against current FCS and SUS average tuition and fees excluding distance learning fees
- Competency-based programs can be priced at 60% of credit based program tuition due to lower system costs

Out-Of-State Benchmarks:

- Credit-based programs are priced at competitive market prices implying ~30% profit margins
- Competency-based programs can be priced at 60% of credit based program tuition due to lower system costs

In-State Tuition and Fees

Credit-Based Programs			
	Associate's	Bachelor's	Graduate
Per Credit Hour	\$104	\$202	\$422
Per Year	\$3,106	\$6,069	\$12,648

Competency-Based Programs			
	Associate's	Bachelor's	Graduate
Per Credit Hour	\$62	\$121	\$253
Per Year	\$1,864	\$3,641	\$7,589

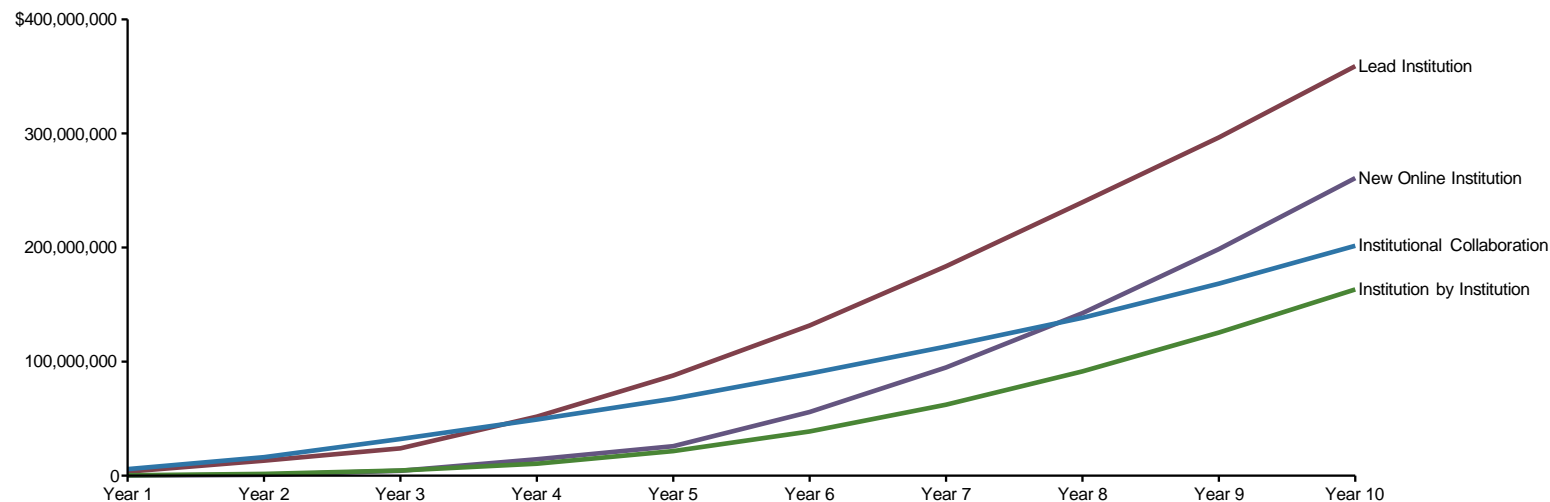
Out-of-State Tuition and Fees

Credit-Based Programs			
	Associate's	Bachelor's	Graduate
Per Credit Hour	\$175	\$450	\$600
Per Year	\$5,250	\$13,500	\$18,000

Competency-Based Programs			
	Associate's	Bachelor's	Graduate
Per Credit Hour	\$105	\$270	\$360
Per Year	\$3,150	\$8,100	\$10,800

Revenue from Tuition and Fees – Total Projections

Total Revenue from Tuition and Fees by Strategy, 10 Year Forecast



Total Tuition and Fees Revenue (000's)										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Institution by Institution	\$346	\$1,539	\$4,516	\$10,501	\$21,561	\$38,708	\$62,195	\$91,404	\$125,415	\$163,261
Institutional Collaboration	\$5,732	\$16,226	\$32,134	\$49,231	\$67,466	\$89,495	\$113,170	\$138,409	\$168,335	\$201,543
Lead Institution	\$3,522	\$13,139	\$23,935	\$51,765	\$87,792	\$131,666	\$183,566	\$239,685	\$296,478	\$358,979
New Online Institution	\$0	\$715	\$4,288	\$14,384	\$25,869	\$55,826	\$94,823	\$142,458	\$198,626	\$260,875

Strategy Detail

Expenditure per Completion Summary

	1	2	3	4
	Institution by Institution	Institutional Collaboration	Lead Institution(s)	New Online Institution
Total Completions (Over 10 Years)	25K	48K	77K	41K
Total Expenditure (Over 10 Years)	\$0.9B	\$1.4B	\$1.9B	\$1.1B

Expenditure Per Completion = Expenditure per Credit x (Credits Needed / Graduation Rate)

Example				
Expenditure per BA Credit (Year 10)	\$416	\$395	\$332	\$335
Graduation Rate (Year 10))	42%	49%	57%	57%
Expenditure per BA Completion (Year 10)	\$79K	\$64K	\$47K	\$47K

Strategy Detail

Expenditure per Completion in Year 10 By Degree Level

		Strategy 1	Strategy 2	Strategy 3	Strategy 4
Undergraduate Certificate	Expenditure per Credit	\$173	\$162	\$148	\$151
	Graduation Rate (Year 10)	65%	70%	74%	74%
	Expenditure per Completion (Year 10)	\$4,812	\$4,195	\$3,604	\$3,673
Associate's	Expenditure per Credit	\$173	\$162	\$148	\$151
	Graduation Rate (Year 10)	25%	29%	34%	34%
	Expenditure per Completion (Year 10)	\$30,583	\$24,218	\$19,050	\$19,413
Bachelor's	Expenditure per Credit	\$416	\$395	\$332	\$335
	Graduation Rate (Year 10)	42%	49%	57%	57%
	Expenditure per Completion (Year 10)	\$78,912	\$64,041	\$46,522	\$46,917
Master's	Expenditure per Credit	\$416	\$395	\$332	\$335
	Graduation Rate (Year 10)	64%	71%	78%	78%
	Expenditure per Completion (Year 10)	\$23,408	\$20,017	\$15,282	\$15,411

Detailed Fact Base

Strategy Detail

National Post-Secondary Online Market

Examples of Innovative Models

Florida Persistence

Florida Online Enrollments

Florida Online Programs

Florida Tuition and Fees

Florida Employment

Florida Virtual Campus

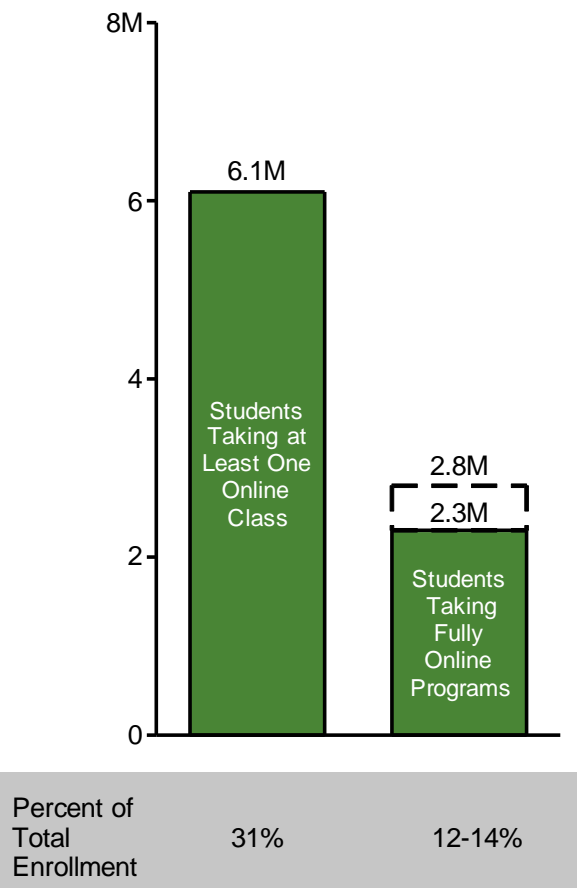
Accreditation Detail

Stakeholder Interviews

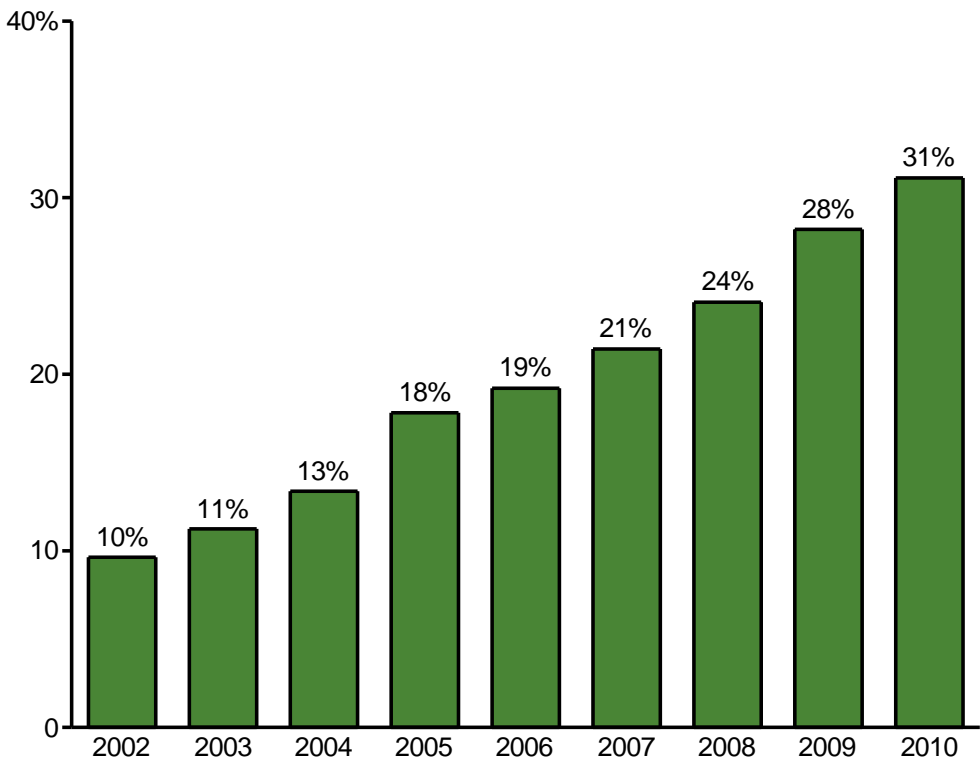
National Post-Secondary Online Market

Post-Secondary Online Enrollments

National Post-Secondary
Online Enrollments, 2010-2011



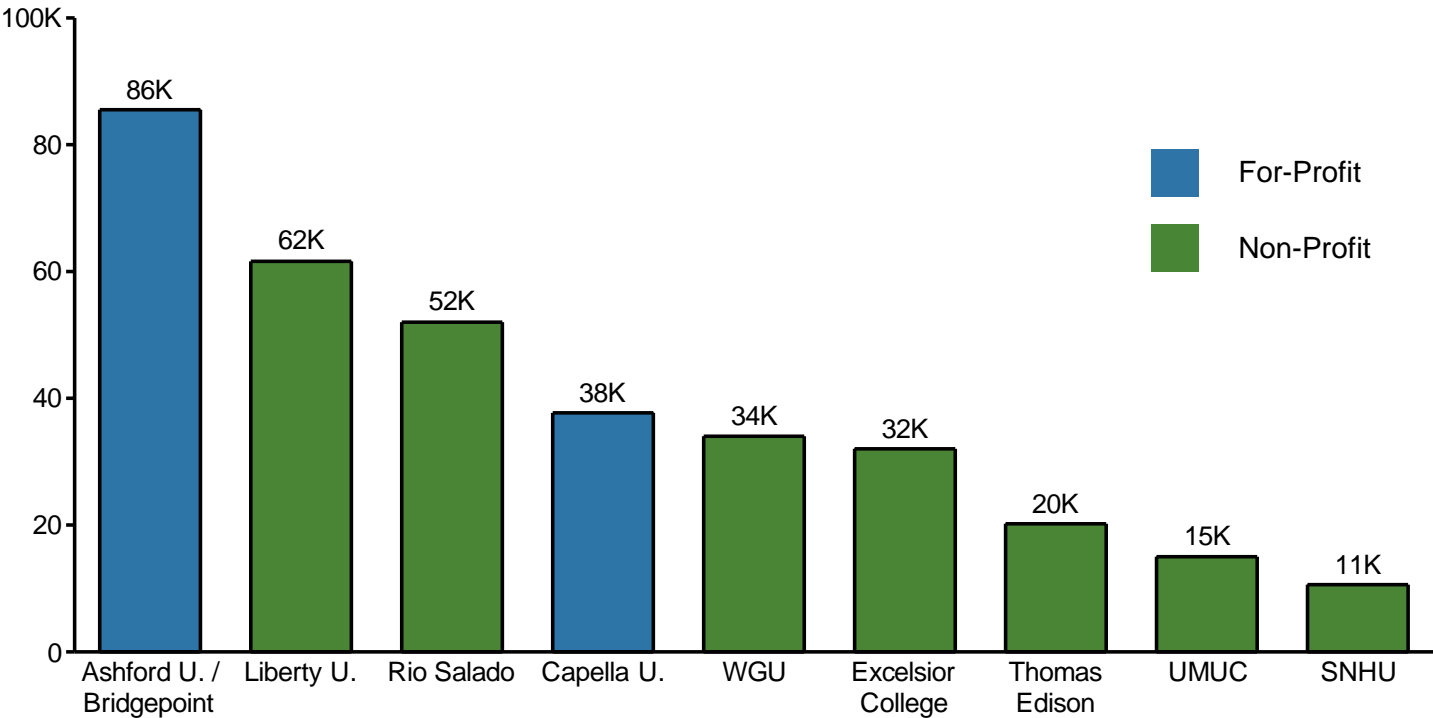
Percent of Nationwide Students Taking at Least One
Course Online, 2002-2010



National Post-Secondary Online Market

Primarily Online Institution Enrollments

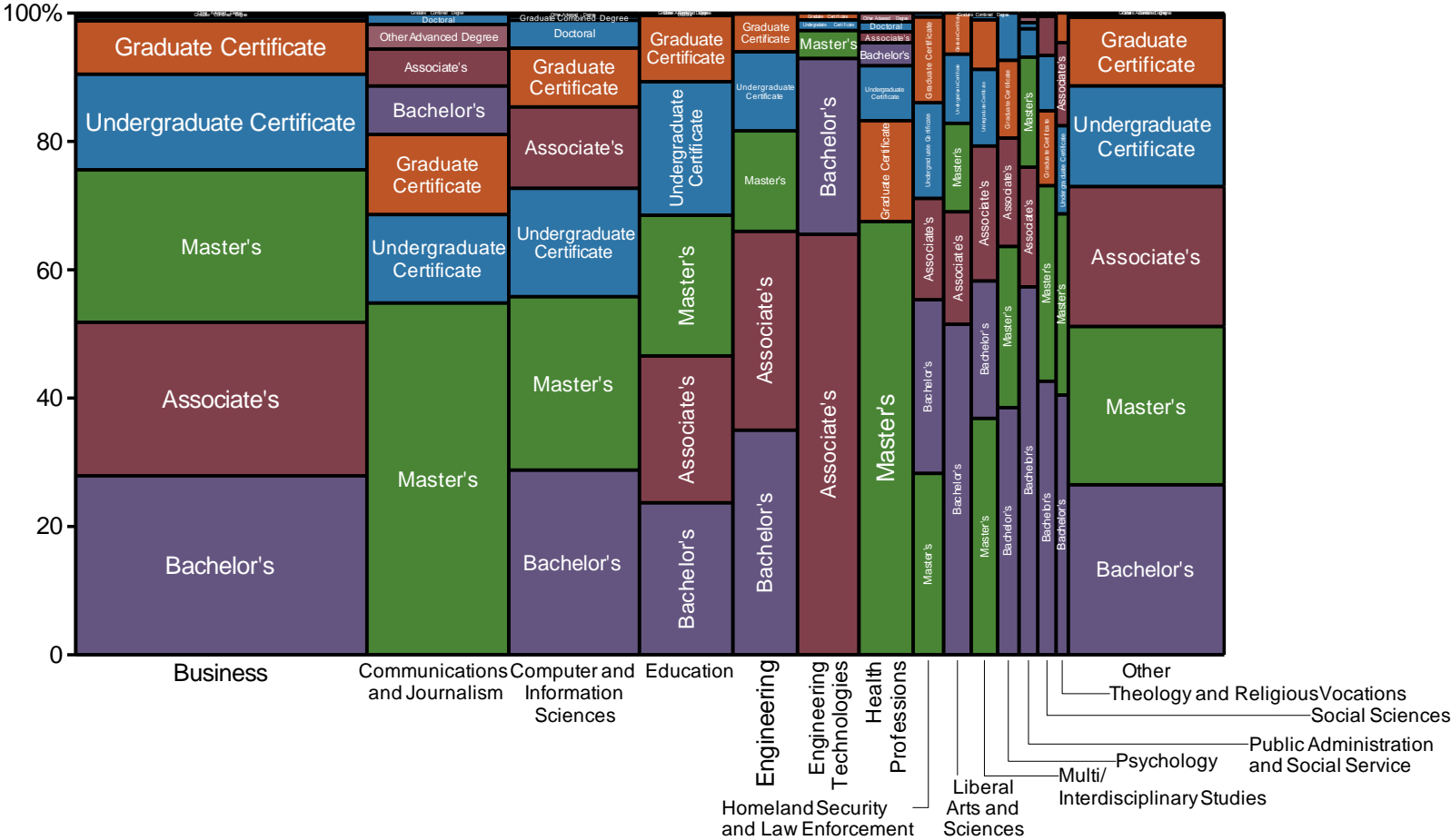
Post-Secondary Enrollments in Large
Primarily Online Institutions, 2010-2011



Estimated % Master's Enrollments	24%	29%	0%	51%	27%	2%	3%	30%	27%
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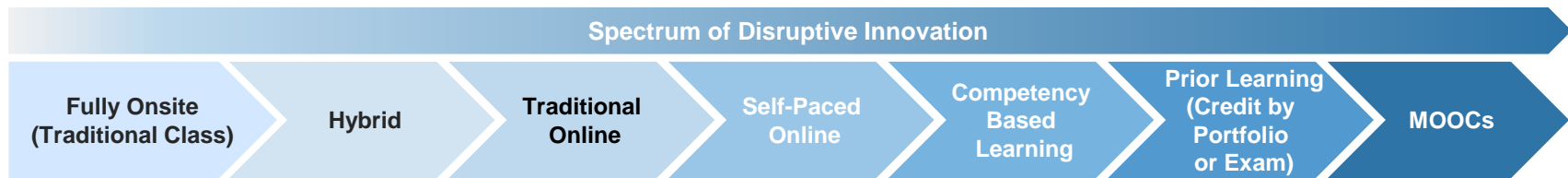
Representative Sample: Distance Learning Programs by Level and Program Area, 2010-2011

Representative Sample: Distance Learning Programs by Level and Program Area, 2010-2011

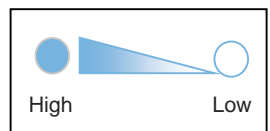


National Post-Secondary Online Market

Spectrum of Models

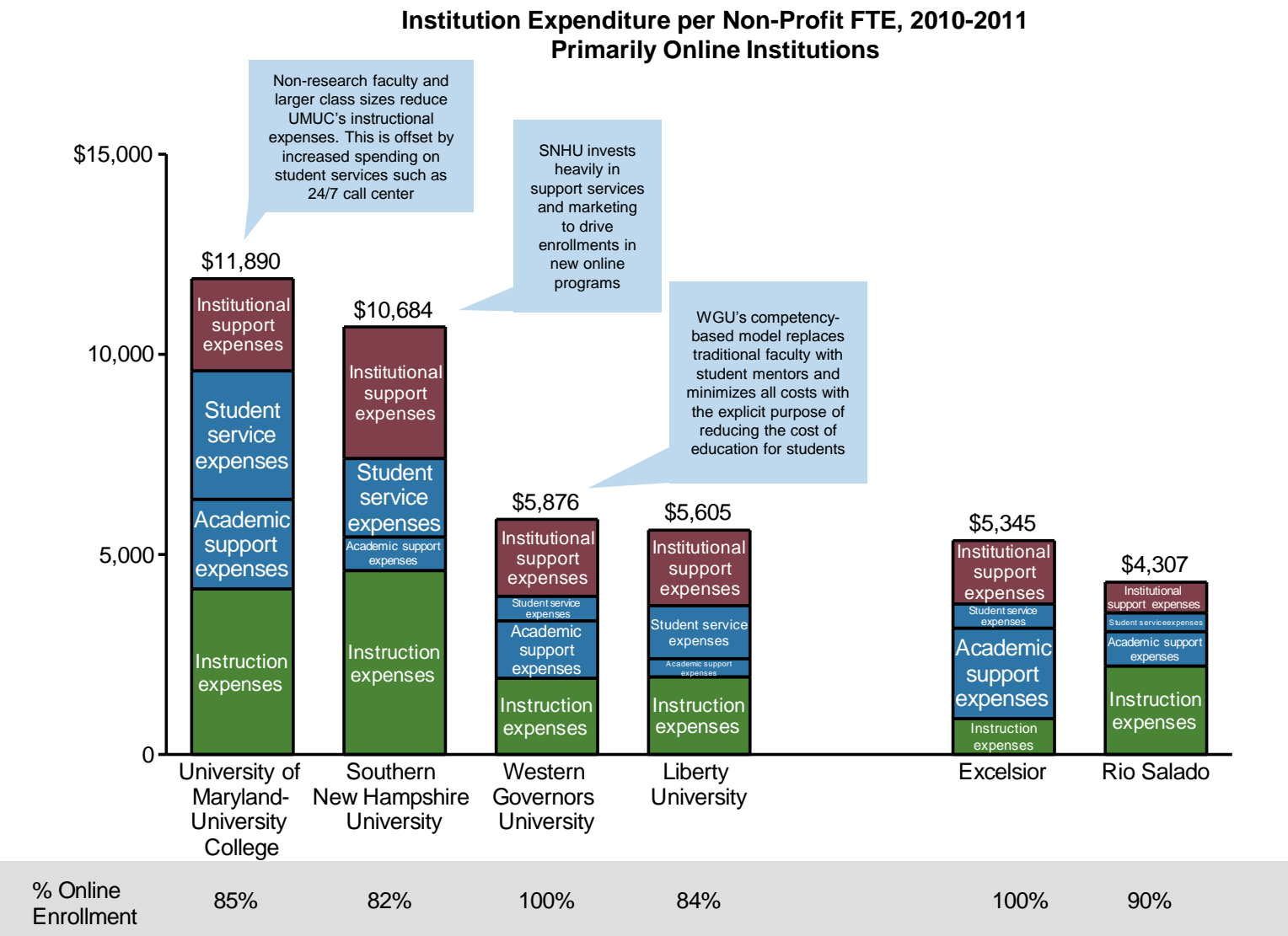


Total Expenditure per Student							
Learning Model	<ul style="list-style-type: none"> Traditional educational model 	<ul style="list-style-type: none"> Increased schedule flexibility Less need for classroom facilities 	<ul style="list-style-type: none"> No need for physical classroom facilities Same curriculum and duration as traditional onsite, but 100% online An increase in the number of start dates is utilized by some programs to provide increased flexibility 	<ul style="list-style-type: none"> Courses are 100% online and self paced Increased scheduling flexibility Reduced faculty involvement 	<ul style="list-style-type: none"> Courses are 100% online and self paced Degree based on mastery of material Students able to test out of material they already know Shortens time to completion Reduces the cost of instruction 	<ul style="list-style-type: none"> Course credit granted for prior knowledge from nonacademic experiences Credit granted either by exam or by portfolio proving work competency Shortens the time to completion Reduces the cost of instruction 	<ul style="list-style-type: none"> "Massively Open Online Courses" Enrollment free and available to anyone but courses do not culminate in a degree Open enrollment maximizes access Instructional and testing model still in infancy
Current Target Student	<ul style="list-style-type: none"> Traditional students 	<ul style="list-style-type: none"> Traditional students 	<ul style="list-style-type: none"> Traditional and non-traditional students Working adults Older demographic 	<ul style="list-style-type: none"> Non-traditional students Working adults Older demographic 	<ul style="list-style-type: none"> Non-traditional students Working adults Older demographic 	<ul style="list-style-type: none"> Non-traditional students Working adults Older demographic 	<ul style="list-style-type: none"> All students



National Post-Secondary Online Market

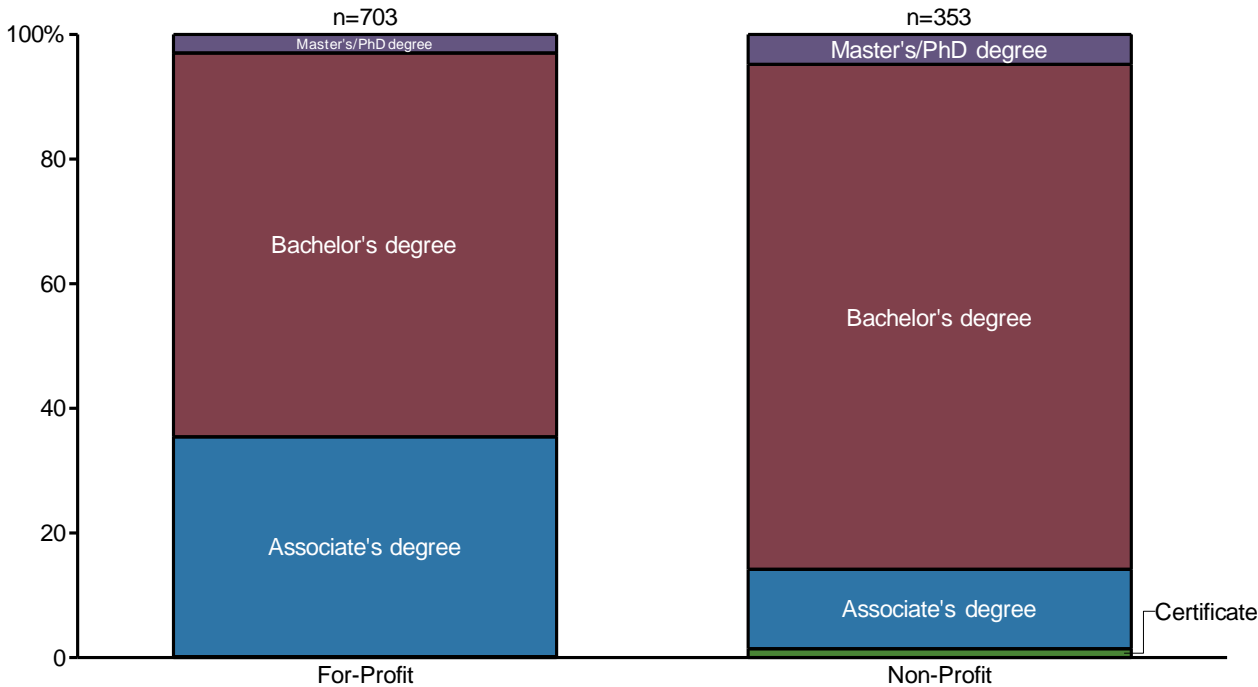
Expenditures per Non-Profit FTE: Primarily Online Institutions



National Post-Secondary Online Market

Parthenon August 2012 Post-Secondary Online Student Survey

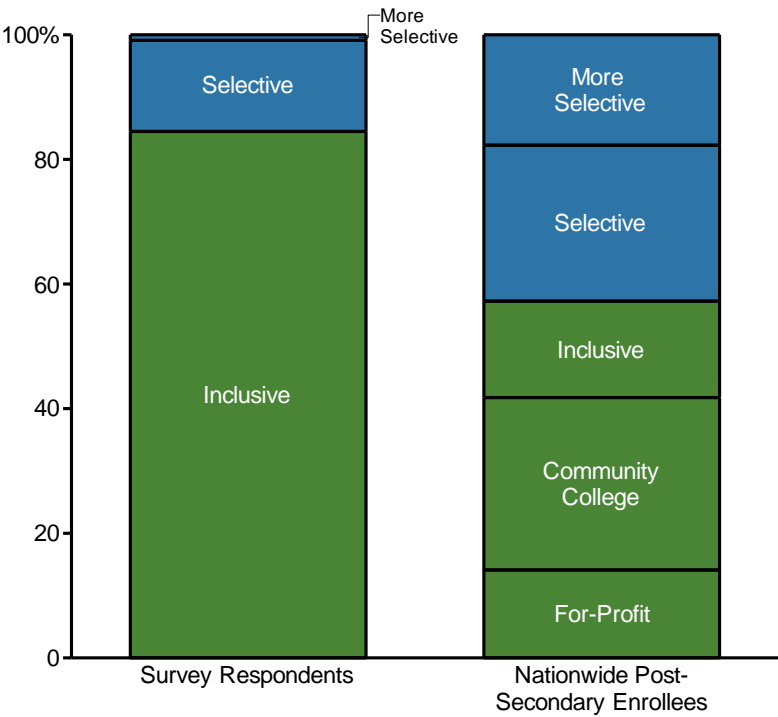
Q: In which of the following programs are you currently enrolled?



National Post-Secondary Online Market

Parthenon August 2012 Post-Secondary Online Student Survey

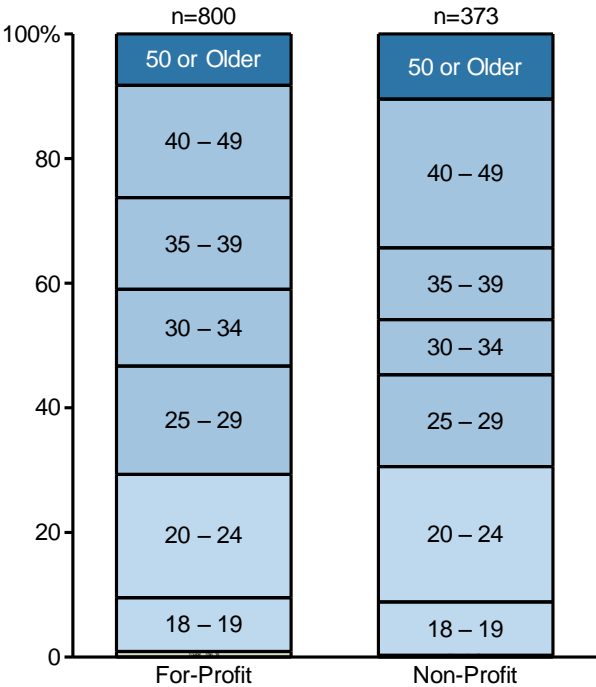
Unduplicated Headcount, Enrollment by Institution Type, 2011



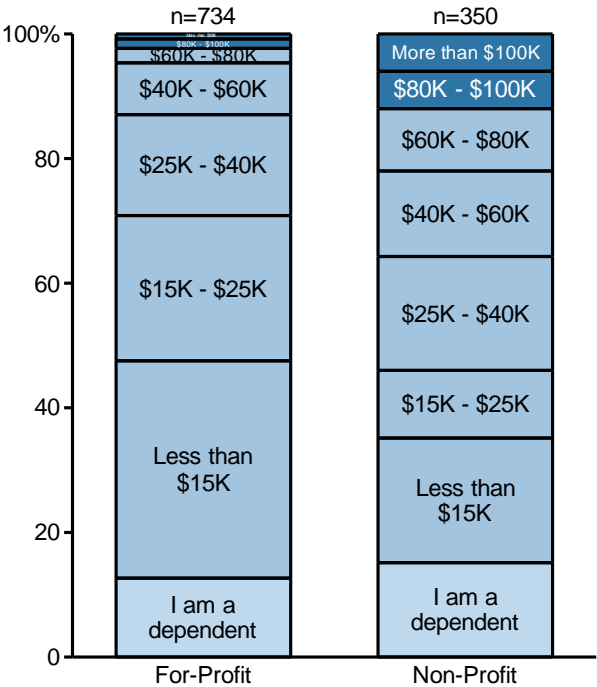
National Post-Secondary Online Market

Parthenon August 2012 Post-Secondary Online Student Survey

Age Demographic of Respondents



Income of Respondents



National Post-Secondary Online Market

Parthenon August 2012 Post-Secondary Online Student Survey

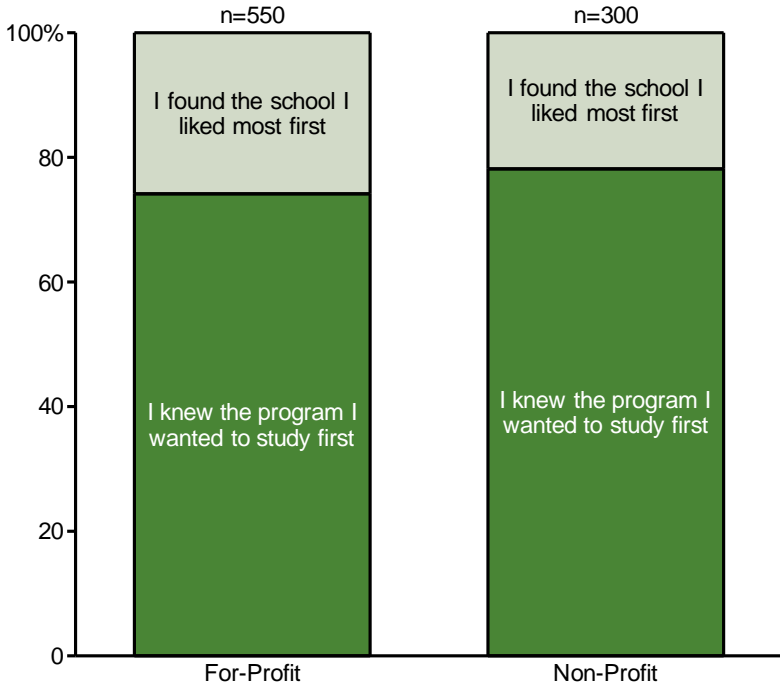
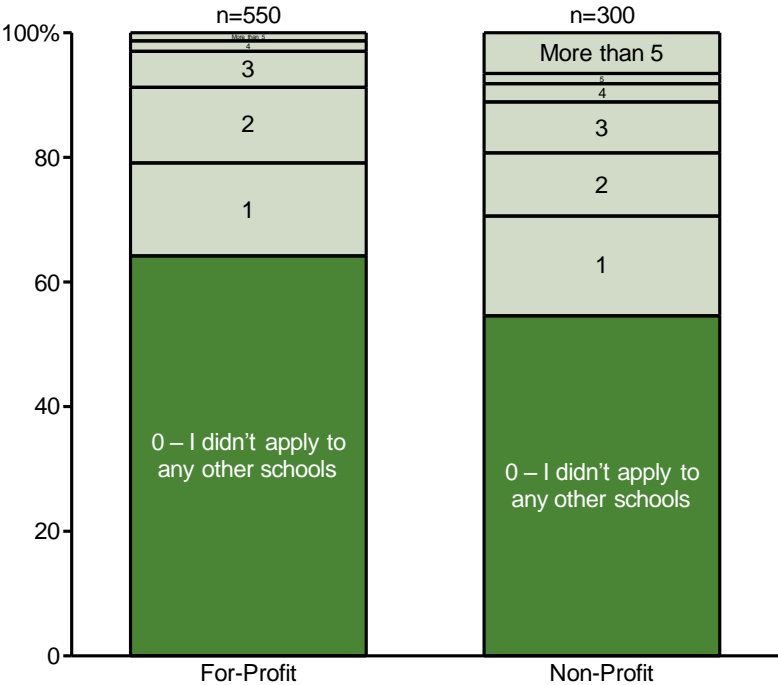
Q: What are your reasons for wanting to attend college?	
For-Profit	Non-Profit
1) To fulfill a personal goal	1) To fulfill a personal goal
2) To make more money	2) To make more money
3) To gain skills for the job market	3) To gain skills for the job market
4) Opportunity to change careers	4) For the sake of learning
5) Employers require a degree	5) Employers require a degree

National Post-Secondary Online Market

Parthenon August 2012 Post-Secondary Online Student Survey

Q: When you applied to college, how many other schools did you apply to?

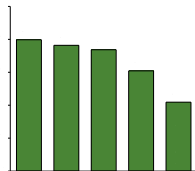
Q: Which of the following describes how you made the decision about what school to attend?



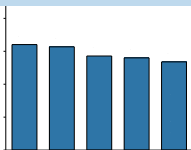
National Post-Secondary Online Market

Parthenon August 2012 Post-Secondary Online Student Survey

Q: How likely would you be to recommend your school to a friend or colleague? (Net Promoter Score)



Non-Profit Responses



For-Profit Responses

Detailed Fact Base

Strategy Detail

National Post-Secondary Online Market

Examples of Innovative Models

Florida Persistence

Florida Online Enrollments

Florida Online Programs

Florida Tuition and Fees

Florida Employment

Florida Virtual Campus

Accreditation Detail

Stakeholder Interviews

Innovative Post-Secondary Online Institutions

UMUC – Example of an institution that transformed its offerings into primarily online

	University of Maryland, University College
Why innovative?	<ul style="list-style-type: none"> Primarily online public institution Offers credit for prior learning by portfolio
Tuition	<ul style="list-style-type: none"> \$251/credit (residents); \$499/credit (non-residents)
Offerings	<ul style="list-style-type: none"> 100 programs, ~800 courses Traditional Online and Prior Learning Assessment (PLA) Courses
School Size and Type	<ul style="list-style-type: none"> Public institution ~50K online-only enrollments, ~60K total enrollment
Program/ Course Profile	<ul style="list-style-type: none"> Prior Learning Assessment: Students can complete a Portfolio* or take a “course challenge” to earn UMUC credits with prior learning; Students must enroll in a Portfolio development course for ~\$3K to create their Portfolio and have it evaluated Maximum of 30 credits can be obtained through PLA, and PLA can fulfill up to half of major and minor credits Course challenge: a test equivalent to a course’s final exam taken for the same cost as the course; if passed student earns a credit for that course
External Relationships	<ul style="list-style-type: none"> Under the umbrella of the University of Maryland system along with 11 other schools

Innovative Post-Secondary Online Institutions

Rio Salado – Example of a community college that transformed its offerings into primarily online

Rio Salado, Maricopa Community Colleges	
Why innovative?	<ul style="list-style-type: none">• Community college that has transformed into a primarily online institution (with approximately 90% of students enrolled in online only programs)• Teacher-Student ratio allows the school to achieve extremely low costs
Tuition	<ul style="list-style-type: none">• \$76/credit (In-state resident, living in AZ for >1 year); \$212/credit (In-state non-resident , living in AZ<1 year); \$317/credit (out of state)
Offerings	<ul style="list-style-type: none">• 100+ online programs, 600+ online courses
School Size and Type	<ul style="list-style-type: none">• Public institution• ~52K online-only enrollments
Program/ Course Profile	<ul style="list-style-type: none">• Students may enroll to take individual online courses or pursue a certificate or associate degree• Also offers GED, Adult Basic Education Classes, and ELL courses• College has transfer relationships with 32 universities if students wish to pursue a bachelor's degree (schools include UMUC and WGU)• 17 physical locations offering Advising, Tutoring and Counseling services, Computer Labs, Testing Centers and state-of-the-art classrooms
External Relationships	<ul style="list-style-type: none">• Part of the Maricopa Community College Network; transfer relationships with state of Arizona's universities

Innovative Post-Secondary Online Institutions

SNHU – Example of a university that transformed its offerings into primarily online

	Southern New Hampshire University
Why innovative?	<ul style="list-style-type: none"> Private not-for-profit university that has transformed into a primarily online university (with ~85% of students enrolled in online only programs)
Tuition	<ul style="list-style-type: none"> \$320/undergraduate credit; \$627/graduate credit
Offerings	<ul style="list-style-type: none"> 180+ online programs; 40+ undergraduate majors Traditional Online and Hybrid Courses
School Size and Type	<ul style="list-style-type: none"> Private, nonprofit institution ~11K online-only enrollments
Program/Course Profile	<ul style="list-style-type: none"> Offers Certificate, Associate's, Bachelor's and Master's degrees Developing competency-based learning for Associate's degrees
Support Services	<ul style="list-style-type: none"> Access to 24/7 tech support as well as full access to SNHU's Shapiro Library collection – all of which has been digitized 5 physical locations, offering student services, classrooms Students are monitored through a new software system that tracks factors that predict student success (e.g., length of their average post on a class discussion board or how long it's been since their last class) and alerts advisors to flagging students Student coaches track student progress from enrollment through graduation 9 person analytics team responsible for tracking student performance SNHU is in the process of piloting new student advising program
External Relationships	<ul style="list-style-type: none"> Community economic development program – strategic partnerships with community action groups provide students with additional training opportunities, real world experience, and partial academic scholarships

Innovative Post-Secondary Online Institutions

WGU – Example of a new online institution offering competency based programs

	Western Governors University
Why innovative?	<ul style="list-style-type: none"> Designed to meet the learning needs of working adults Programs employ competency-based education, which is focused on measuring learning rather than seat time
Tuition	<ul style="list-style-type: none"> Flat fee/6 month term (\$2,890 - \$4,250); no tuition increases over the last 5 years
Offerings	<ul style="list-style-type: none"> Programs are offered in four areas: business, information technology, teacher education and health care
School Size and Type	<ul style="list-style-type: none"> Private, nonprofit institution ~37K students and almost 1,800 in Florida
Program/ Course Profile	<ul style="list-style-type: none"> Programs and courses are designed around developing and assessing key competencies; students move through coursework as quickly as they can demonstrate mastery in course subject matter Student mentors give academic support via weekly/biweekly academic progress conversations Course mentors (like professors) who are subject matter experts provide course-specific academic assistance as needed Alumni provided assistance in developing resumes, interview skills, job hunting skills Additional support services include: financial aid, financial literacy, orientation, scholarships, field placements, withdrawal recovery, social networking, online library, ADA/VA accommodations, WellConnect (EAP provided to students at no extra cost) In 2011, was the nation's leading provider of master's degrees in math education, 3rd largest in science education and 4th largest in bachelor's in math education Student satisfaction rated higher than overall recent college grad results (http://www.wgu.edu/about_WGU/graduate_success); surveys of employers also showed positive results
External Relationships	<ul style="list-style-type: none"> To ensure that curriculum is relevant to employer needs, WGU collaborates with industry councils in each discipline Through partnerships with Indiana, Washington, and Texas, WGU operates state-chartered universities in those states. These universities are subsidiaries of WGU and all enrolled students residing in those states are served by the state-chartered institutions Each state-chartered WGU is led by a resident chancellor and works with a State Advisory Board composed of leaders in government, academia, and industry WGU provides all of the curriculum, learning resources, mentoring, and student services for the state-chartered universities

Innovative Post-Secondary Online Institutions

Northern Arizona University – Example of an institution developing competency-based learning

Northern Arizona University – Personalized Learning	
Why innovative?	<ul style="list-style-type: none"> In the process of developing competency-based programs with flat-rate tuitions, specifically targeting degree completers and working adults
Goal and Population Served	<ul style="list-style-type: none"> Directive from University President to innovate in all programs, including online. Also responding to national call to lower cost of higher education
Political Conditions	<ul style="list-style-type: none"> Arizona Board of Regents, which oversees the universities, has set several goals for the universities related to enrollment and increasing the number of college graduates No additional grants or subsidies were given by the state to specifically incent Personalized Learning initiative, although existing state funding has contributed. In addition, NAU was a recipient of a Next Generation Learning Challenges grant If enrollment goals are not met, institution governance and Board of Regents will determine if online degrees are beneficial to the universities and the state http://azregents.asu.edu/public/abouttheboard/arizona%20higher%20education%20enterprise/arizona-higher-education-enterprise.pdf) (http://www.azregents.edu/abouttheboard/arizonahighereducationenterprise/default.aspx)
Model and Tuition	<ul style="list-style-type: none"> Model: Competency Tuition: Flat rate of \$5K per year (\$2500 per 6 month subscription), subscription model
School Size and Type	<ul style="list-style-type: none"> Public Institution Launching 2013
Course Development and Teaching	<ul style="list-style-type: none"> Offerings: Business Administration, Computer IT, and Liberal Arts programs; designed through a collaboration of current NAU professors, new hires, and Pearson instructional designers Degrees are new degrees developed specifically for this flexible delivery model Partner: Pearson provides the platform for course delivery, pretesting and post-testing competencies. Northern Arizona pays Pearson \$875/enrolled student every six months Faculty: NAU faculty develop and vet courses. Newly hired, full-time assistant professors are responsible for instruction

Innovative Post-Secondary Online Institutions

ASU – Example of partnership model

	Arizona State University – ASU Online
Why innovative?	<ul style="list-style-type: none"> Given public funding constraints, ASU engaged in a public/private partnership to leverage marketing, instructional design, support services and technology capabilities
Goal and Population Served	<ul style="list-style-type: none"> Important component of ASU's overall mission of the University to broaden the number of students it enrolls and graduates. Reflects the desire to set standards by the quality of graduates, not the exclusivity of admissions Goal: 100,000 online students by the year 2020
Political Conditions	<ul style="list-style-type: none"> Arizona Board of Regents, which oversees the universities, has set several goals for the universities related to enrollment and increasing the number of college graduates No grants or subsidies were given by the state to encourage these efforts If enrollment goals are not met, institution governance and Board of Regents will determine if online programs are beneficial to the universities and the state (http://azregents.asu.edu/public/abouttheboard/arizona%20higher%20education%20enterprise/arizona-higher-education-enterprise.pdf) (http://www.azregents.edu/abouttheboard/arizonahighereducationenterprise/default.aspx) To respond to labor market needs, ASU works closely with local industries both for placing and recruiting students in several programs (e.g., Master's in Ed, RN to BSN, and Criminal Justice)
Model and Tuition	<ul style="list-style-type: none"> Model: Credit-based Tuition: <\$500 per credit hour, plus fees; \$1500 per class
School Size and Type	<ul style="list-style-type: none"> Public Institution Reached 7K online enrollments in first year of business program
Course Development and Teaching	<ul style="list-style-type: none"> Offerings: ~60 fully online courses Partner: Pearson provides marketing, instructional design assistance as needed, content if the faculty want it, enrollment coaching, retention coaching, technology to support our efforts. Revenue split with Pearson Faculty: Either faculty develop and teach the course with the assistance of TAs, graders, etc. or faculty develop and vet a course, then oversee adjuncts who teach the course

Innovative Post-Secondary Online Institutions

KCTCS – Example of a Collaborative Model (p1)

Kentucky Community and Technical College System – Learn On Demand	
Why innovative?	<ul style="list-style-type: none"> Centralized coordination of all competency-based program offerings throughout the community college system
Program Initiation	<ul style="list-style-type: none"> Survey commissioned by the presidents of the KCTCS. Results showed 1.34 million people in KY without a degree, 187 thousand extremely or very likely to enroll in post-secondary opportunities if it fits their need. Survey also showed what types of programs were in highest demand (IT, Business) Launched Learn On Demand in 2008, with presidents of the colleges as the BOD Used RFP process to develop content for the courses. Any of the 16 colleges could submit their plan and budget for a program The central system determined the phase 1, round 1 programs they wanted were just business administration and information technology. General Education courses were developed in phase 1, round 1 to complete the AAS degree options and AA/AS degrees Each lead college needed to show a sustainability plan for the program. A cap was put on course development costs at \$1000 per credit hour
Political Conditions	<ul style="list-style-type: none"> There was no pressure from the state to offer additional online programs (KCTCS had been offering traditional online programs since 2001) The state was supportive though and gave KCTCS a revolving loan through the Council for Postsecondary Education
Population Served	<ul style="list-style-type: none"> ~2100 students
Course Development and Teaching	<ul style="list-style-type: none"> The lead college orchestrates the entire process of content development and course delivery. They can hire course leaders and course developers to put the content together. And then they hire adjunct faculty to teach the courses. They set up the scheduling and offerings of the course in Peoplesoft The 16 individual colleges can enroll students in each course. It is up to course faculty to cap the number of students in a particular course (they only get paid for the number of students they teach) Required eResources are provided by a content provider and managed through Barnes & Noble
Flexible Curriculum Options	<ul style="list-style-type: none"> Competency-based model, short courses (modular)

Innovative Post-Secondary Online Institutions

KCTCS – Example of a Collaborative Model (p2)

Kentucky Community and Technical College System – Learn On Demand	
Administrative Services and Costs	<ul style="list-style-type: none"> • \$460,000 loan to launch Learn on Demand. KCTCS has paid back this loan to KCPE, and Learn on Demand is intended to be totally self-sufficient on tuition revenue. This investment went to building the website and infrastructure, marketing and sub grants for institutions developing the classes • System office provided QA certification funding, Blackboard, module development support (largest system expense was the 24/7 student support services) • Three hires at the central office (instructional design expert to help with quality assurance, student services coordinator for 24/7 student serves, and curriculum specialist to support faculty). Colleges must also hire or allocate someone to be a liaison between the college and the program
Revenue	<ul style="list-style-type: none"> • KCTCS' Learn on Demand revenue for Fiscal Year 2012 was \$1,077,550. However, since some colleges were still paying back development costs, the net profit was approximately \$120,000. For fiscal year 2013, all development costs will have been paid back • Projected revenue for fiscal year 2013 is \$3,795,120 with net profit of around \$2,300,000. The program will have increased operational expenses due to serving more students and adding more academic services in 2013 • Tuition revenue is used to reimburse central services costs and lead colleges for delivery costs. Any additional tuition goes to six Learn on Demand Charter Colleges. FTE allocations go to home college. eResource fees are split between content provider and Barnes & Noble
Quality Assurance	<ul style="list-style-type: none"> • Peer Review - All courses are peer reviewed before they are offered to students, and KCTCS has created a quality assurance (QA) procedure that measures both the courses and the delivery process. The QA procedure includes interviews with students who drop classes and student course evaluations, both at midterm and completion • Training - Faculty must apply to teach courses and complete training on how to teach and facilitate learning in a Learn On Demand online class. After they have taught the class, it is evaluated by the quality assurance procedure and the students. If the quality assurance review indicates a problem, the teacher must complete further training • Coaches - All students in Learn On Demand gets a coach to help support them, make sure they are settled in academic program • Results - This attention to quality has paid off in improved student performance. After some experimentation, Learn on Demand has increased the rate of students finishing a module with a passing grade to 88 percent, higher than the 86 percent rate for students on the physical campus
Marketing	<ul style="list-style-type: none"> • Search engine management and optimization program, trying to drive people to website. Direct mail campaigns are also used

Innovative Post-Secondary Online Institutions

WICHE ICE – Example of a Collaborative Model across states / institutions (p1)

	Western Interstate Commission for Higher Education – Internet Course Exchange
Why innovative?	<ul style="list-style-type: none"> WICHE's Internet Course Exchange (ICE) allows institutions to share online courses across states and university / college systems Potential for institutions to partner in developing and offering joint programs
Organization Description	<ul style="list-style-type: none"> Regional nonprofit higher education service organization (one of four regional compacts in U.S.) WICHE membership includes 15 western states; institutions in 7 states participating in ICE
Internet Course Exchange Description	<ul style="list-style-type: none"> Alliance of member institutions and systems that broadens student access to online courses and programs Enables students to seamlessly access other two- and four-year institutions' online courses while using the advisory, registration, and financial aid services provided at their home campuses ICE provides the step-by-step advice for this multi-institutional collaboration
Benefits	<ul style="list-style-type: none"> For institutions with a strong online offering, allows the institutions to export empty seats to other institutions to generate revenue For institutions with students interested in an online course that they do not offer, they can import vacant seats from a course offered by another institution
Population Served	<ul style="list-style-type: none"> 5 institution members; 3 consortia members; 2 affiliated consortia Currently ~80 students annually are taking courses through the exchange Also powers Nexus Exchange between 10 nursing PhD programs –approximately 80 students participate annually
Revenue	<ul style="list-style-type: none"> Institutions that are importing courses are buying and setting up those courses as their own and, therefore, count the student enrollments Institutions that are exporting courses are the "Teaching Institution" and receive fee revenue, not enrollments Teaching Institutions make the seats available to Enrolling Institutions at the agreed upon WICHE ICE common wholesale price set by the Steering Board annually (currently \$150 per credit hour for undergraduate courses and \$200 per credit hour for graduate courses) Students at enrolling institution will pay for the course at the retail price it sets (tuition plus mandatory fees) WICHE keeps 15% of wholesale price

Innovative Post-Secondary Online Institutions

WICHE ICE – Example of a Collaborative Model across states / institutions (p2)

Western Interstate Commission for Higher Education – Internet Course Exchange	
Administrative Details	<ul style="list-style-type: none">• Academic department chairs must ensure that courses taught by the other institution are truly interchangeable with their own. The course is set up in the enrolling institution’s own registration system and is reflected on its own transcript. Up to the enrolling institutions to determine if they will accept courses, given their admissions standards, etc.• Because enrolling institutions set up imported courses as their own in their student record systems, students do not submit additional admission applications, register through another college, or get their financial aid manually adjusted• Institutions do not need to have common LMS, SIS. Students must use the LMS of the teaching institution for the course. There have been no problems with this thus far
WICHE’s Role	<ul style="list-style-type: none">• Acts as the centralized broker, bills the Enrolling Institutions for each enrollment at the common wholesale or negotiated wholesale price agreed upon by the members• WICHE retains an administrative fee (15% of wholesale price) for each enrollment and pays the balance to the Teaching Institution

Innovative Post-Secondary Online Institutions

VCCS – Example of a Lead Institution Model (p1)

Virginia Community College System – Northern Virginia Community College as the Leader	
Why innovative?	<ul style="list-style-type: none"> Online program offerings and supports come from lead college in the community college system
Program Initiation	<ul style="list-style-type: none"> NVCC began offering online courses for its own students and over time built up a catalog of 400 courses In 2008, VCCS decided to be more strategic about online education, targeting their offerings to degree programs in those fields in which adult learners seek credentials (based on the courses the for-profits offer, Eduventures research, Education Advisory Board research) In 2011 NVCC launched a pilot allowing other colleges in the VCCS to offer NVCC courses to their students, offered stipend of ~\$20K to participating schools (require schools to have a communications liaison to work with ELI director) – Shared Service Distance Learning (SSDL)
Political Conditions	<ul style="list-style-type: none"> Motivated in part by rumors that the legislature wanted a statewide online solution and would bring in a WGU. VCCS wanted to prove they could provide the solution internally Access was more of a motivation than affordability, although both were considerations
Population Served	<ul style="list-style-type: none"> Serve 23K students at NVCC, 2K from other VCCS schools Only one director hired thus far, no additional hires, no special classes designed
Course Development and Teaching	<ul style="list-style-type: none"> NVCC faculty and staff develop courses (instructional designers work with content experts) Instructor faculty are hired separately and can come from outside the VCCS system All faculty hired and paid by NVCC. Other college does not have to do anything Full time faculty salaries are \$65K, Adjuncts are paid \$3K for a 3 credit course Faculty are paid by enrollment for online courses
Flexible Curriculum Options	<ul style="list-style-type: none"> Will introduce prior learning assessment models Will introduce credit-by-examination using MOOCs

Innovative Post-Secondary Online Institutions

CSU-Global Campus – Example of a New Public Online-Only University

Colorado State University – Global Campus	
Why innovative?	<ul style="list-style-type: none"> • CSU-GC is a relatively new 100% online university • Designed to serve the unique needs of non-traditional adult learners • CSU-GC is giving credit for proctored exams for Udacity MOOC courses
School Type	<ul style="list-style-type: none"> • Public institution • 6,500 active students, approximately 65% are Colorado residents
University Initiation	<ul style="list-style-type: none"> • University launched in 2007 as a separate University within the CSU system, and began enrolling students in 2008 • Received independent, regional accreditation in 2011 (prior to that, student registration and financial aid came through sister campuses) • University does not receive any state appropriations and operates exclusively through its own cash flow. Initially granted \$12 million loan for the creation of CSU-Global Campus by the CSU System Board of Governors. The loan and interest have been repaid in full • University was created as a statutorily separate state institution to provide it with the opportunity to fulfill its unique mission
Tuition	<ul style="list-style-type: none"> • Bachelor's Degree - Cost per credit: \$350; cost for 3 credit course: \$1050 <ul style="list-style-type: none"> – Estimated tuition for student with 90 transfer credits: \$10,500 – Estimated tuition for student with 60 transfer credits: \$21,000 – Estimated tuition for student with 30 transfer credits: \$31,500 • Master's Degree - Cost per credit: \$500; cost for 3 credit course: \$1500 • Students pay the same tuition regardless of residency status (in-state or out-of-state). Tuition guarantee ensures that tuition will never increase as long as the student is enrolled in his/her degree program • Final exam for Udacity's courses occurs at an independent testing center and costs \$89 (administered by Pearson)

Innovative Post-Secondary Online Institutions

CSU-Global Campus – Example of a New Public Online-Only University

Colorado State University – Global Campus	
Course Development and Teaching	<ul style="list-style-type: none"> • Provides online graduate degrees, undergraduate degrees, completion programs, and individual courses • Programs are offered in management, technology, business, and education • Courses are primarily credit-based • All faculty members are adjunct and trained by the university to address the unique needs of adult learners in an online environment
Flexible Curriculum Options	<ul style="list-style-type: none"> • Prior Learning Assessment (PLA) program allows students to complete PLA portfolio projects that document prior education and experience to match CSU-Global course competencies • Credits earned through exams (AP, CLEP, DSST, StraighterLine, etc.), vocational school or military experience; other non-collegiate sources of credit can be evaluated and may be accepted • CSU-GC is giving credit for proctored exams for Udacity (MOOC) courses
Program/ Course Profile	<ul style="list-style-type: none"> • Classes start every four weeks and the enrollment process is streamlined to allow students to quickly begin coursework • Courses are eight weeks long • Students have access to 24/7 tutoring (live support and feedback on work) • Students have access to a 24/7 technical support center • The school provides a virtual library with 24/7 access to a librarian • Program design, support services and marketing are all done internally
Retention Rates	<ul style="list-style-type: none"> • Fall 2009 to Fall 2012 cohort retention/graduation rate is 73% • First-to-third term retention is 82% (FY12) • Fall-to-Spring term retention averages 92% and Spring-to-Fall term retention averages 87% (FY11 & FY12)
External Relationships	<ul style="list-style-type: none"> • CSU-GC is part of the Colorado State University System, which includes Colorado State University, Colorado State University-Pueblo and Colorado State University-Global Campus • CSU-Global has Industry Advisory Councils for each degree program. Councils are comprised of 7-10 industry leaders

Detailed Fact Base

Strategy Detail

National Post-Secondary Online Market

Examples of Innovative Models

Florida Persistence

Florida Online Enrollments

Florida Online Programs

Florida Tuition and Fees

Florida Employment

Florida Virtual Campus

Accreditation Detail

Stakeholder Interviews

Persistence Studies

Findings from studies on online vs. onsite persistence rates

Current meta-analyses show high efficacy of online learning

Other studies shine doubt on these findings, especially in remedial courses

However, there are still unaccounted for drivers of retention and success across modality

Key Findings:

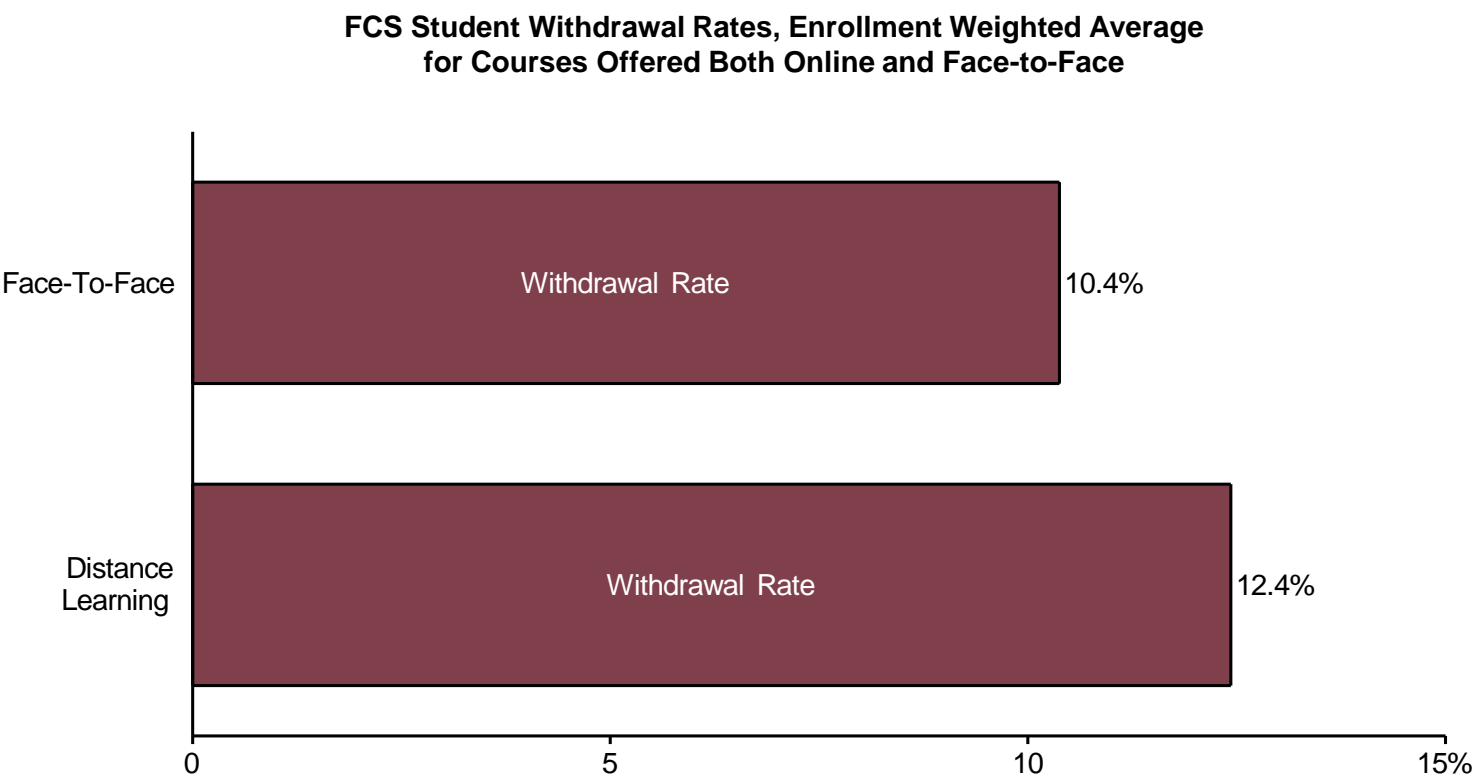
- Students in classes with an online component have modestly higher achievement than those in purely traditional classes
 - *Evaluation of Evidence-Based Practices in Online Learning, NCES*
- The majority of meta-analyses focus on post-secondary education
 - *Twenty Years of Research on the Academic Performance Differences Between Traditional and Distance Learning*
- Studies looking at students in remedial and entry-level courses “indicate a robust negative impact of online course taking” and lower achievement levels
 - *The impact of technology on community college students' success in remedial/developmental Mathematics*
- This is especially true for “low-income and academically underprepared students”
 - *The impact of technology on community college students' success in remedial/developmental mathematics*
- Retention rates were also lower for students who took online classes with no in-person tutoring
 - *Computer-based instruction and remedial mathematics: A study of student retention at a Florida college*
- Regardless of believed efficacy; studies agree that the success of online learning is hugely varied based on student preparedness, content, learner types, and content level
 - *Evaluation of Evidence-Based Practices in Online Learning, NCES; Effectiveness of Fully Online Courses for College Students*
- “Additionally, there is evidence that external socioeconomic factors play a role in student access and success”
 - *Response to a Department of Education Meta-Analysis, CCRC*

Given the evolving nature of both technology and new learnings to improve the efficacy of online, it is **critical that any new Florida initiative include significant data analysis and tracking of outcomes**

Source: [Computer-based Instruction and Remedial Mathematics: A study of Student Retention at a Florida Community College](#), Carol A. Zavarella, University of South Florida Scholar Commons, 2008; [Twenty Years of Research on the Academic Performance Differences Between Traditional and Distance Learning: Summative Meta-Analysis and Trend Examination](#), Shachar and Neumann, MERLOT Journal of Online Learning and Teaching, 2010; [Evaluation of Evidence-Based Practices in Online Learning: A Meta-Analysis and Review of Online Learning Studies](#), NCES, 2010; [Effectiveness of Fully Online Courses for College Students: Response to a Department of Education Meta-Analysis](#), Jaggars and Bailey, 2010; [The Impact of Technology on Community College Students' Success in Remedial / Developmental Mathematics](#), Bendickson, University of South Florida Scholar Commons, 2004

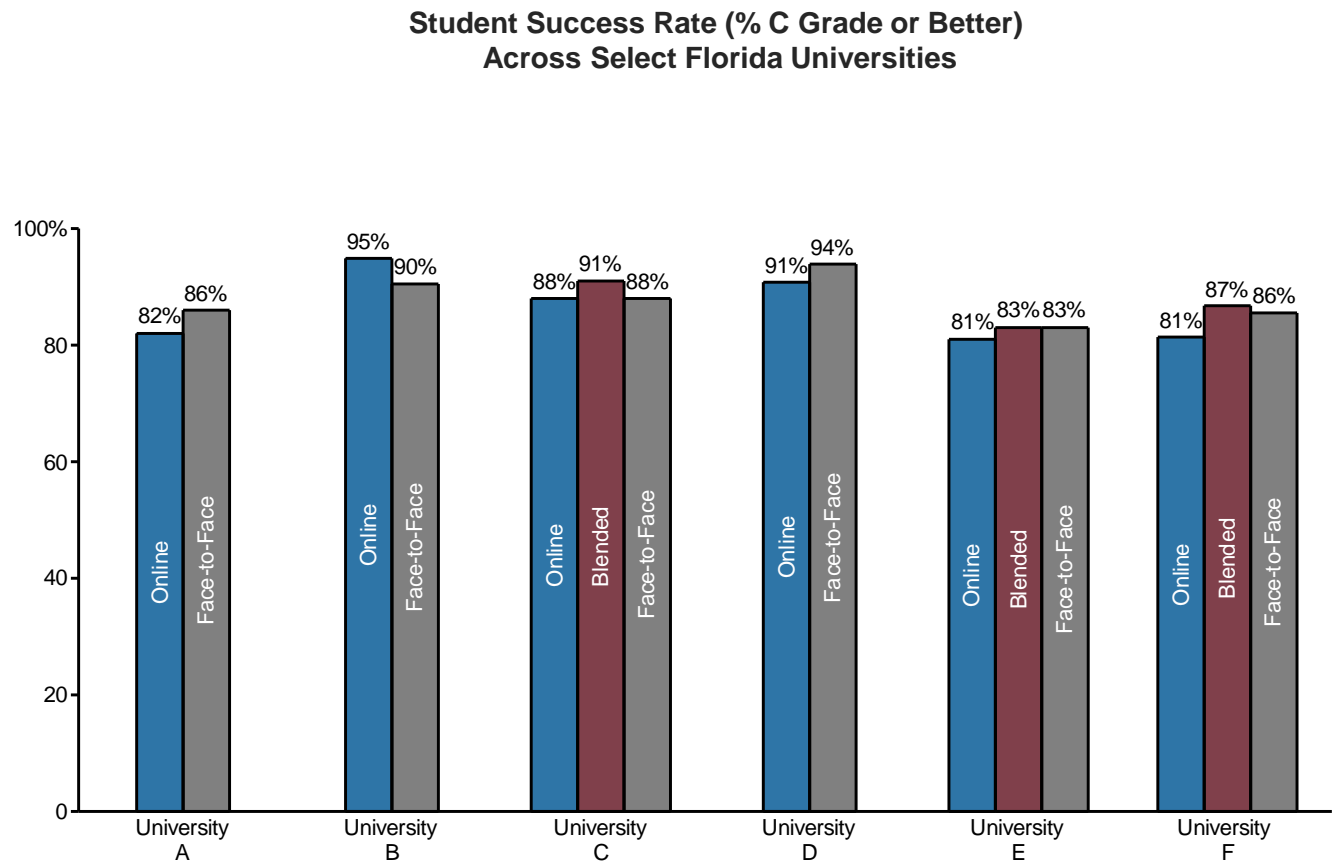
Persistence Studies

FCS Withdrawal Rates – Online vs. Face-to-Face



Persistence Studies

SUS Success Rates – Online vs. Blended vs. Face-to-Face



Detailed Fact Base

Strategy Detail

National Post-Secondary Online Market

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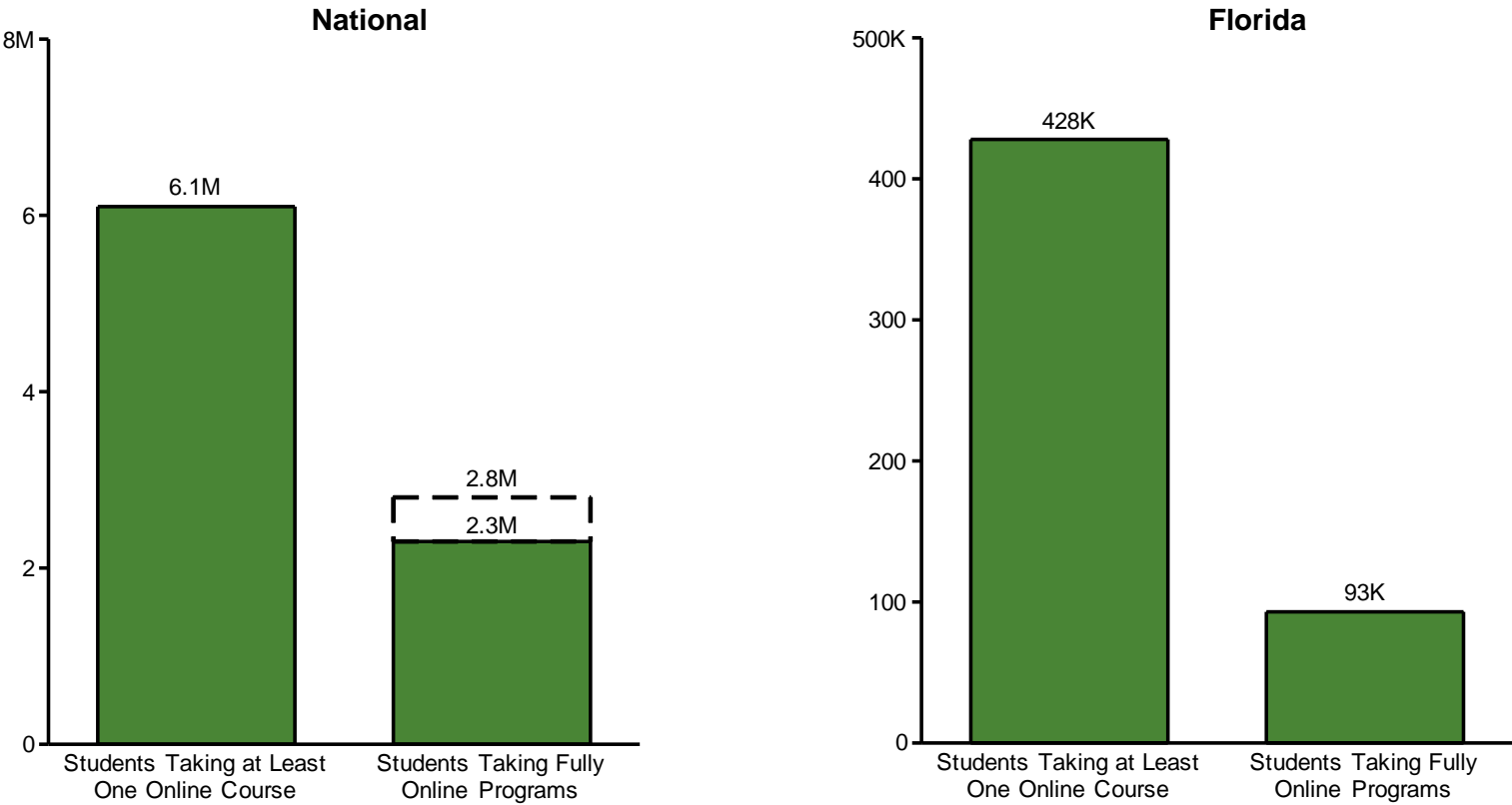
Accreditation Detail

Stakeholder Interviews

Florida Online Enrollments

National and Florida Post-Secondary Online Enrollment

Online Enrollment (Unduplicated Headcount)
Nationally and in Florida, 2010-2011



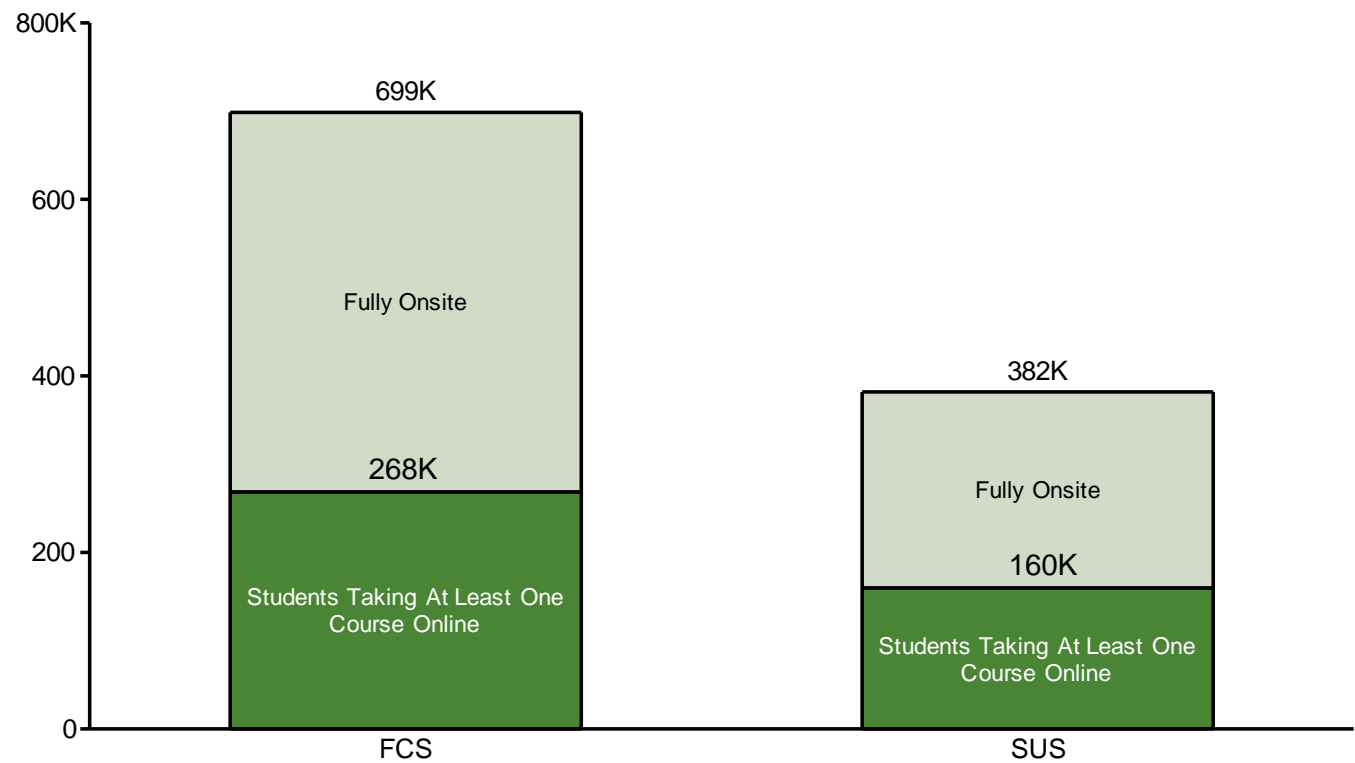
Percent of Total Enrollment	31%	12%-14%
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Percent of Total Enrollment	40%	<10%*
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Florida Online Enrollments

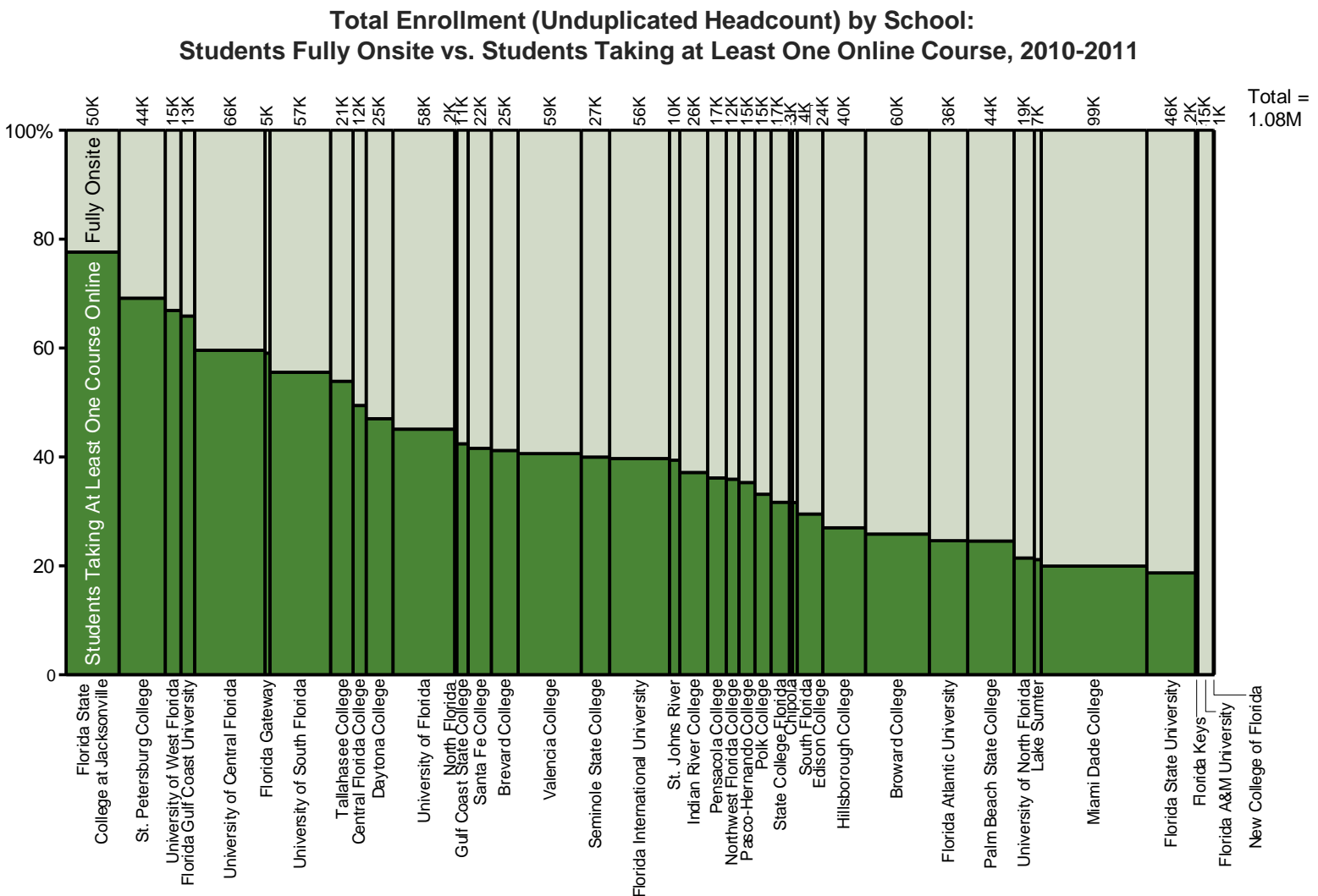
FCS and SUS Students Taking at Least One Course Online

FCS and SUS Total Unduplicated Headcount:
Fully Onsite vs. Students Taking at Least One Online Course, 2010-2011



% Students Taking At Least One Course Online	38%	42%
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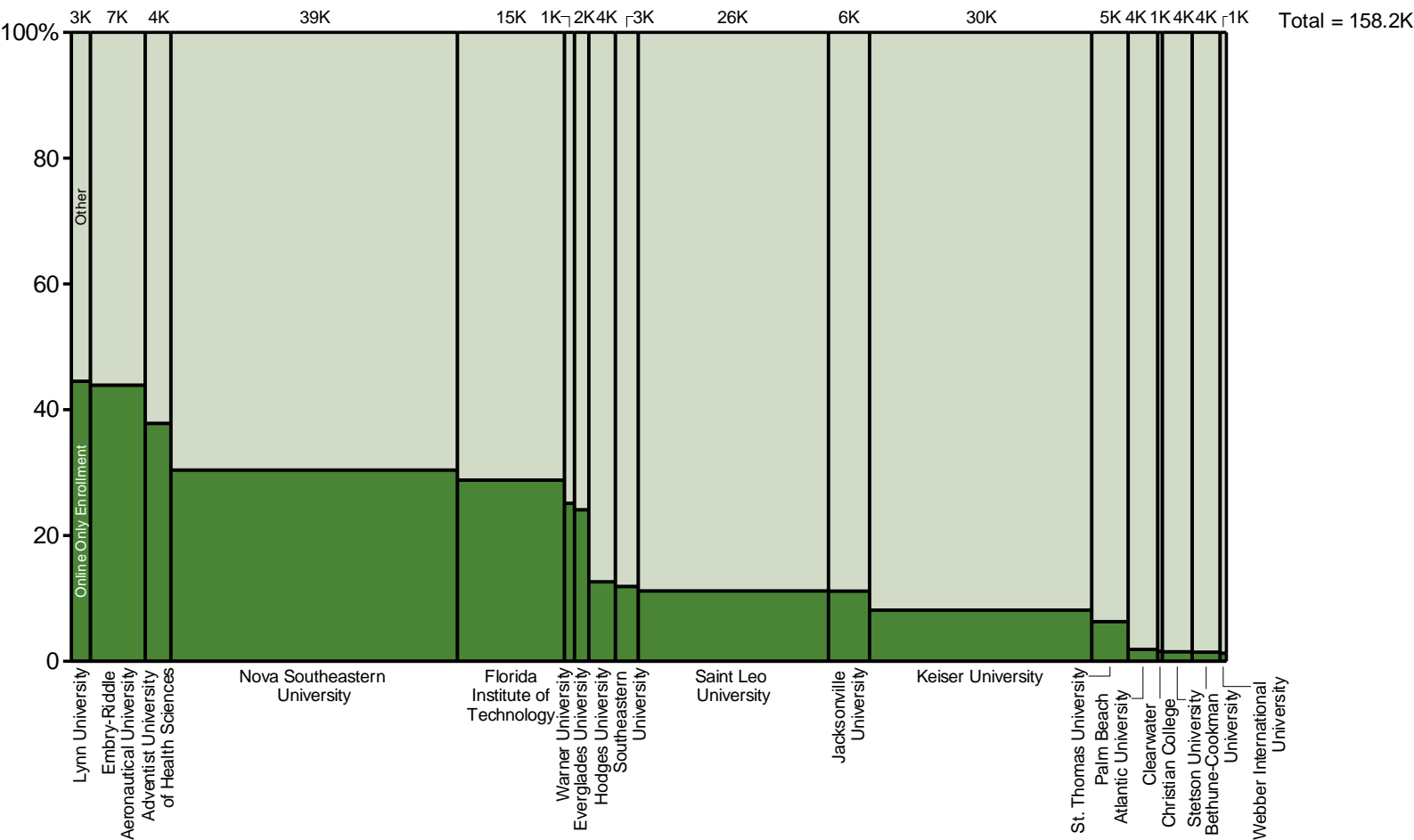
FCS and SUS: Students Fully Onsite vs. Students Taking at Least One Online Course



Florida Online Enrollments

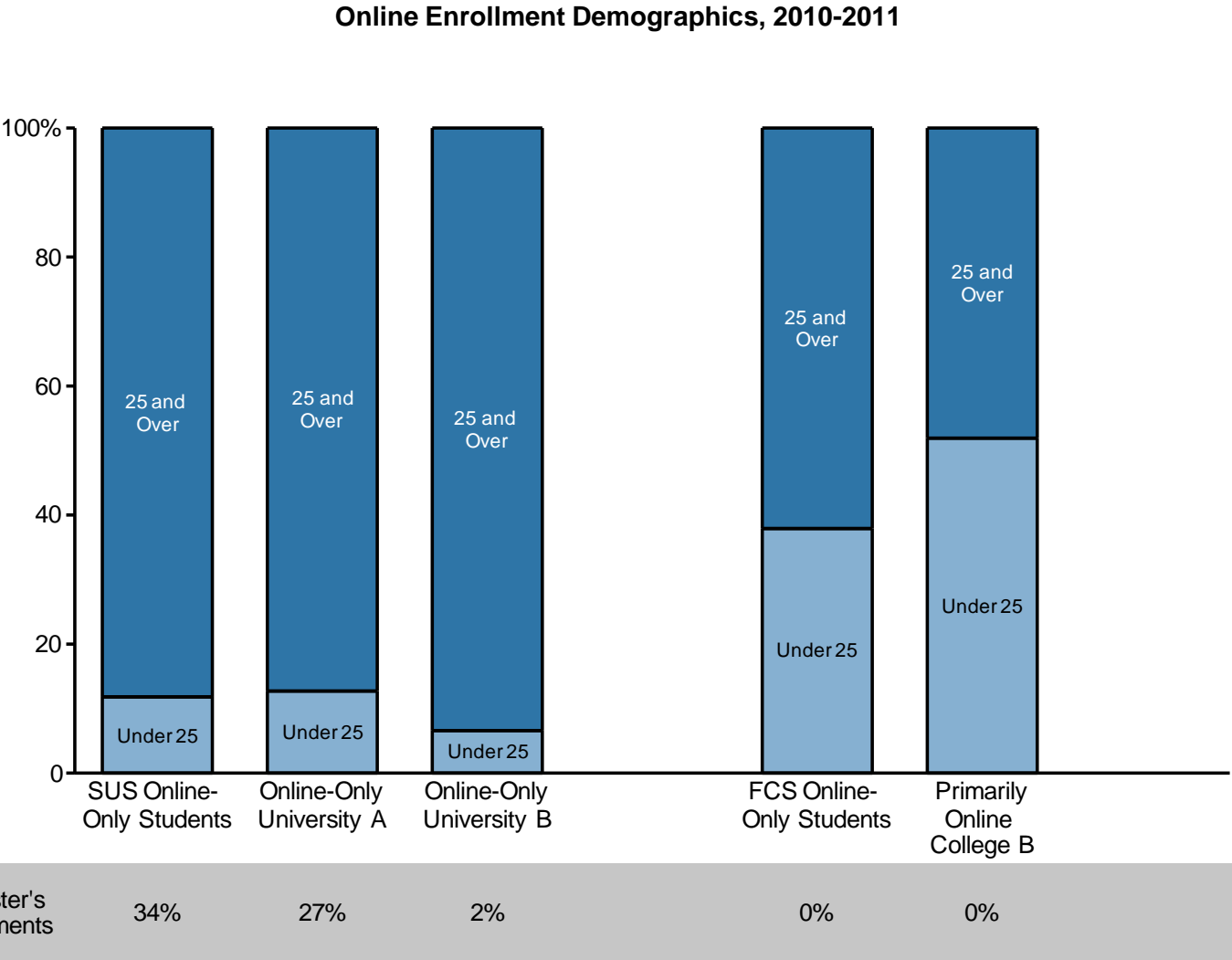
ICUF: Students Fully Onsite vs. Students Taking at Least One Online Course

Total Enrollment (Unduplicated Headcount) by ICUF School:
Fully Onsite or Hybrid vs. Online-Only Students



Florida Online Enrollments

Percent Online Only Enrollment By Age and Percent Master's Degree



Florida Online Enrollments

Undergraduate Enrollment by Age and Modality at SUS Institutions

	Online Only		Online and Onsite	
	Under 25	Above 25	Under 25	Above 25
FAU	94	762	2,244	3,161
FGCU	119	346	5,639	1,340
FIU	424	2,161	8,107	8,610
FSU	55	386	4,860	1,364
UCF	902	3,368	19,900	9,618
UF	505	2,240	15,641	1,609
UNF	24	87	2,165	1,159
USF	480	2,899	14,454	9,332
UWF	283	1,841	3,430	2,631
Grand Total	2,886	14,090	76,440	38,824

Florida Online Enrollments

Graduate Enrollment by Age and Modality at SUS Institutions

	Online Only		Online and Onsite	
	Under 25	Above 25	Under 25	Above 25
FAU	11	710	84	1,826
FGCU	2	254	46	789
FIU	15	676	71	2,276
FSU	7	479	121	1,295
UCF	67	2,046	273	3,295
UF	21	2,153	535	3,484
UNF	1	96	14	515
USF	27	1,321	174	3,039
UWF	16	987	50	576
Grand Total	167	8,722	1,368	17,095

Florida Online Enrollments

Online Only Enrollment by Degree Level at SUS Institutions

	Undergraduate Enrollment	Graduate Enrollment	Total
FAU	856	721	1,577
FGCU	465	256	721
FIU	2,585	691	3,276
FSU	441	486	927
UCF	4,270	2,113	6,383
UF	2,745	2,174	4,919
UNF	111	97	208
USF	3,379	1,348	4,727
UWF	2,124	1,003	3,127
Grand Total	16,976	8,889	25,865

Florida Online Enrollments

Total Online Enrollment by Degree Level in SUS

	Undergraduate Enrollment	Graduate Enrollment	Total
Online and Onsite (Hybrid) Students	115,264 (86%)	18,463 (14%)	133,727
Online Only Students	16,976 (66%)	8,889 (34%)	25,865
All Online Students	132,240 (83%)	27,352 (17%)	159,592

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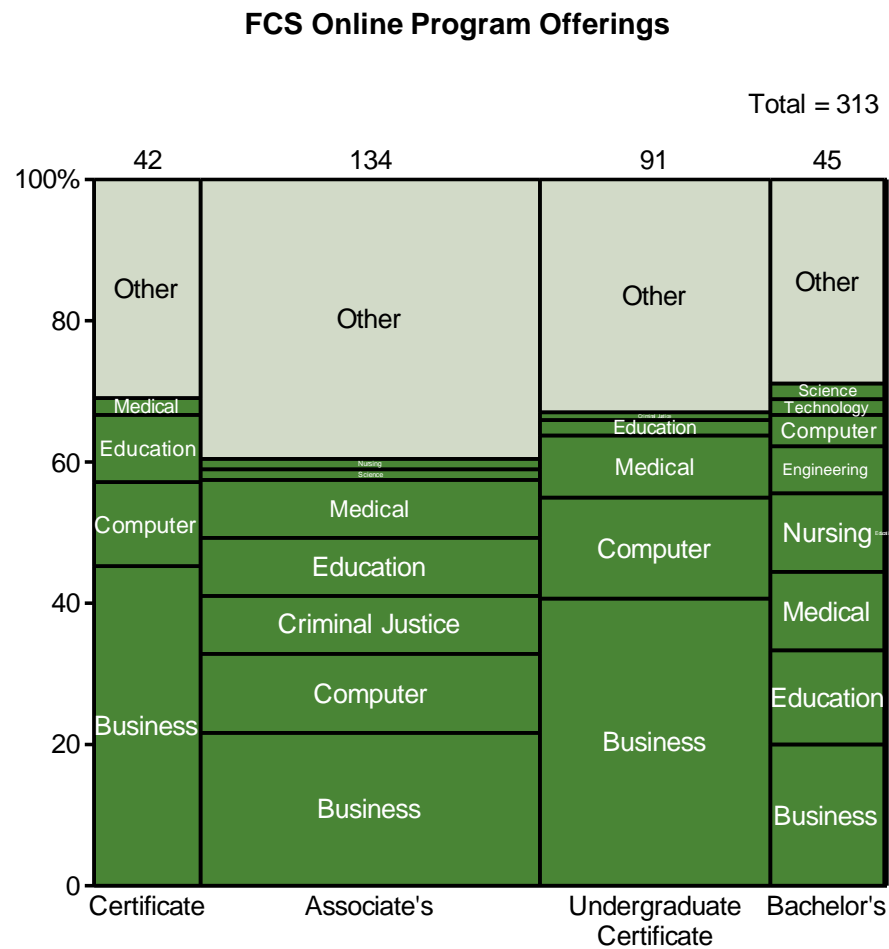
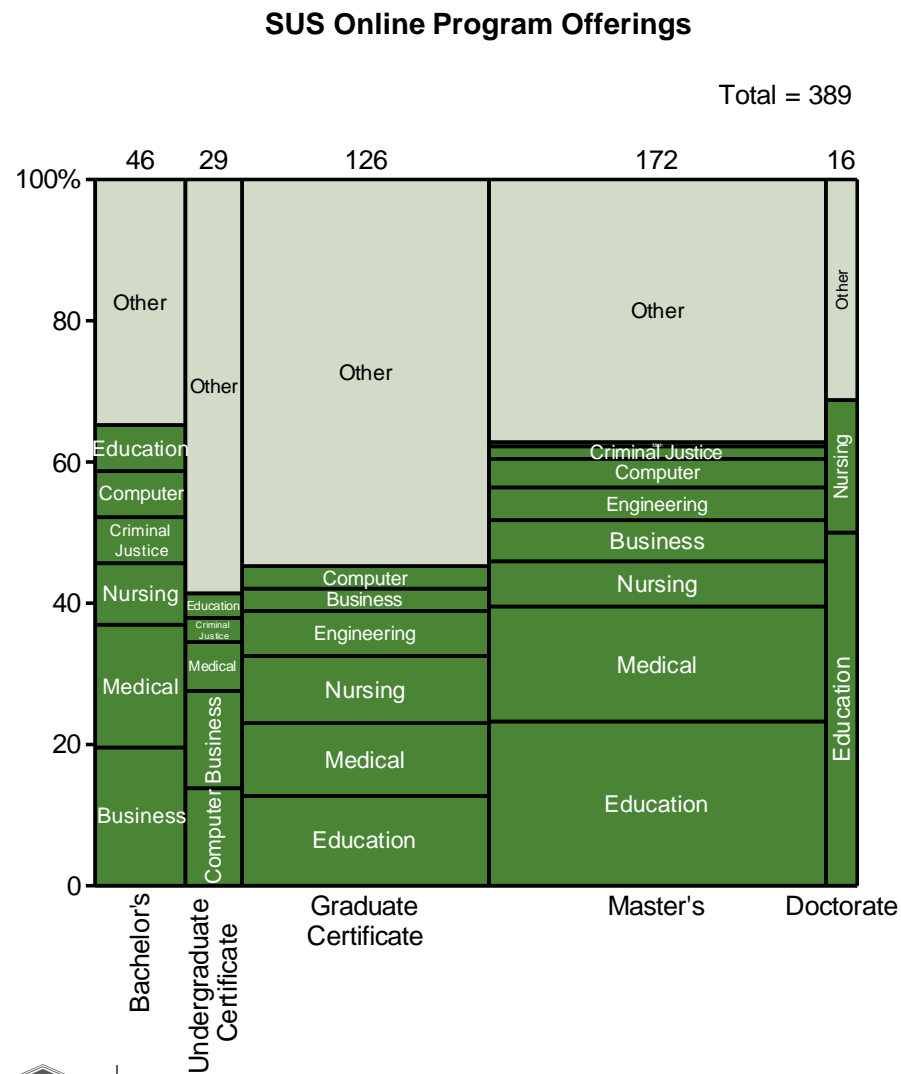
Florida Virtual Campus

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Florida Online Programs

SUS and FCS Online Program Offerings

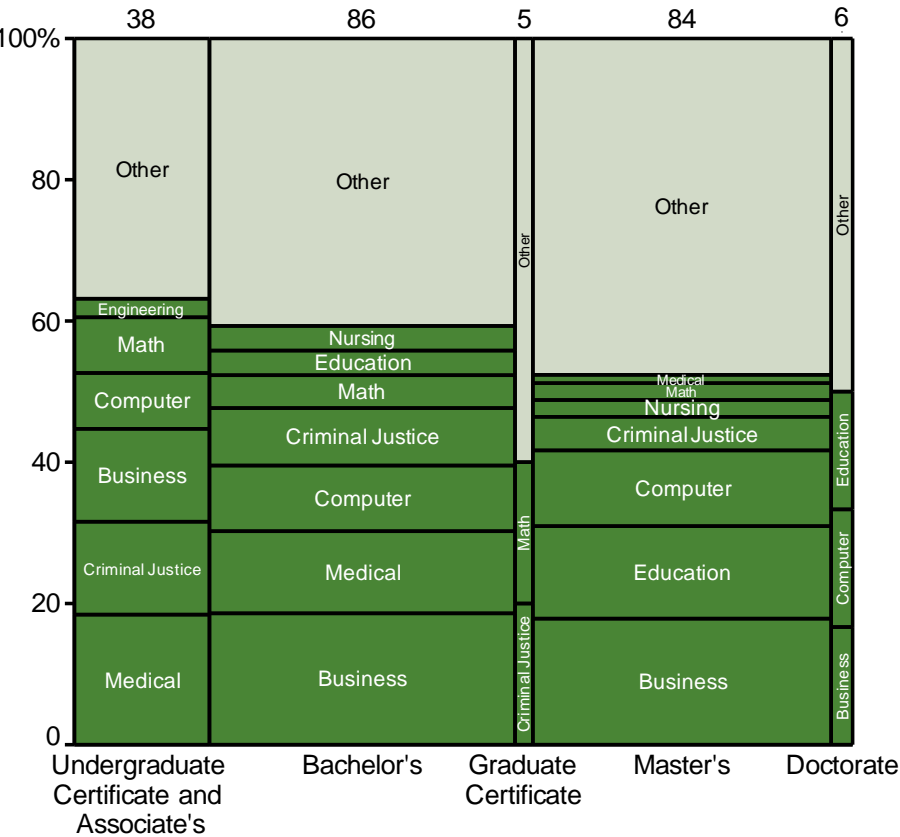


Florida Online Programs

ICUF and For-Profit Program Offerings

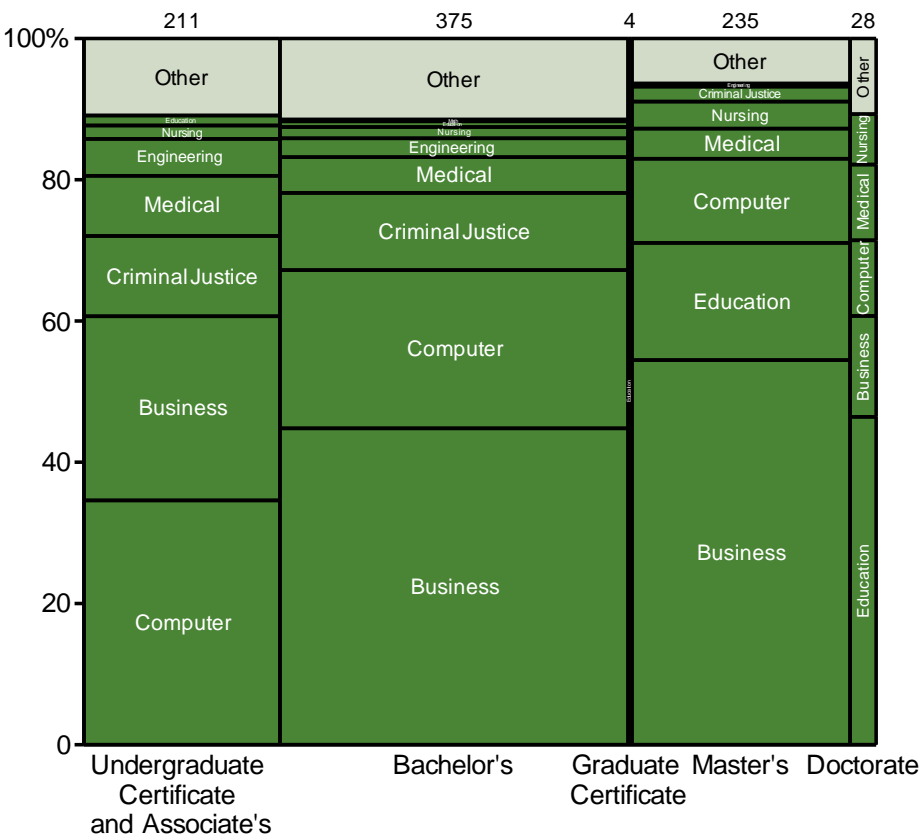
ICUF Online Offerings

Total = 219



For-Profit Online Program Offerings

Total = 853



Florida Online Programs

SUS Online Program Offerings – “Other” Programs

Undergraduate Certificate	Bachelor's
Executive EMS Officer Certificate	Bachelor of Arts in Maritime Studies
Executive Fire & Emergency Services Officer Certificate	Bachelor of Public Administration
Certificate in Export-Import Management	Bachelor of Science Applied Physiology and Kinesiology
Certificate in Geomatics	Bachelor of Science in Fire and Emergency Services
Certificate in Landscape Pest Management	Bachelor of Science in Oceanography
Certificate in Pest Control Technology	Bachelor of Science in Workforce and Program Development
Certificate in Urban Pest Management	Bachelor of Science Microbiology and Cell Sciences
Compliance Specialist	Bachelor of Science Sport Management
Emergency Management	Construction Engineering
Geographic Information Systems	Interdisciplinary Social Science
Gifted Education Program-transcript review	Interdisciplinary Studies
Infant Toddler Development Specialist Program-letter of completion	Political Science
Online Undergraduate Certificate in African and African Diaspora Studies	Psychology B.S.
Public Procurement (UG)	Public Safety Administration
Undergraduate Certificate in Arabic Language and Culture	Public Safety and Security
Undergraduate or Graduate Certificate in Workforce and Program Development	Sports Management
Undergraduate Women's Studies Certificate	

Doctorate
Doctor of Audiology (AuD)
Doctor of Pharmacy - First Professional Degree (PharmD)
Doctor of Pharmacy - Working Professional (PharmD)
Doctor of Philosophy in Classical Civilization (PhD)
Doctor of Philosophy in Latin and Roman Studies (PhD)

Note: Includes FL distance learning programs included in the FLVC
Source: FLVC

Florida Online Programs

SUS Online Program Offerings – “Other” Programs

Graduate Certificate

Applied Operations Research	Concepts and Tools of Epidemiology
Autism Spectrum Disorder	Corrections Leadership
Autism Spectrum Disorders	Design for Usability
Certificate in Advanced Manufacturing	Disaster Management
Certificate in Construction Project Management	Emergency Management
Certificate in Control Systems	Event Management
Certificate in Emergency Services/Disaster Management	Graduate Certificate in Emergency Management
Certificate in Energy Management	Graduate Certificate in Human Performance Technology (HPT)
Certificate in Environmental Forensics	Graduate Certificate in Readiness and Response
Certificate in Environmental Policy Management	Hearing Specialist: Early Intervention
Certificate in Family Financial Planning	Humanitarian Assistance
Certificate in Forensic Death Investigation	Industrial Ergonomics and Safety
Certificate in Forensic DNA and Serology	Infection Control
Certificate in Forensic Drug Chemistry	Informal Science Institutions: Environmental
Certificate in Forensic Toxicology	Institutional Research
Certificate in Forensic Vocational Rehabilitation	Leadership and Management
Certificate in Gas Turbines	Leadership in Developing Human Resources
Certificate in GIS for Urban and Regional Planners	Leadership in Executive and Administrative Development in Social Work
Certificate in Global Strategic Communication	Mathematics
Certificate in Landscape Pest Management	Nonprofit Management
Certificate in Material Characterization	Pharmacy Sciences
Certificate in Non Profit Management	Police Leadership
Certificate in Pest Control Technology	Positive Behavior Support
Certificate in Pharmacy - Pharmaceutical Chemistry	Professional Writing
Certificate in Research Methods in Cultural Anthropology	Project Engineering
Certificate in Soil Ecosystems Services	Public Administration
Certificate in Solar Energy	Public Procurement (Grad)
Certificate in Sustainable Construction	Quality Assurance
Certificate in Sustainable Engineering	Reference Services
Certificate in Sustainable Land Resource and Nutrient Management	School Library Media Leadership
Certificate in Systems Engineering	Technology Management
Certificate in Urban Pest Management	Total Quality Management
Certificate in Wetland and Water Resource Management	Transportation Systems Analysis
Certificate in Wind Turbines	Youth Services
Clinical Investigation	

Florida Online Programs

SUS Online Program Offerings – “Other” Programs

Master's		
Aerospace Engineering	Master of Engineering in Materials Science and Engineering	Master of Science in Entomology and Nematology Specialization - Pest Management
Civil Engineering	Master of International Construction Management	Master of Science in Environmental Engineering Sciences - Specialization in Systems Ecology & Ecological Engineering
Communication Disorders	Master of Latin	Master of Science in Materials Science and Engineering – Various Specializations
Electrical Engineering	Master of Science in Administration	Master of Science in Mechanical Engineering - Dynamics, Systems and Controls
Engineering Management (MSEM)	Master of Science in Administration Specializing in Human Performance Technology Specialization	Master of Science in Mechanical Engineering - Solid Mechanics and Design
English	Master of Science in Administration Specializing in Leadership Specialization	Master of Science in Mechanical Engineering - Thermal Fluids Transport
Forensic Science	Master of Science in Administration Specializing in Public Administration Specialization	Masters in Public Administration
Global Sustainability	Master of Science in Aerospace Engineering - Dynamics, Systems and Controls	Materials Science and Engineering
Industrial Engineering	Master of Science in Aerospace Engineering - Solid Mechanics and Design	Modeling and Simulation
Instructional systems (Major in Performance Improvement and Human Resource Development)	Master of Science in Aerospace Engineering - Thermal Fluids Transport	Nonprofit Management M.N.M
Library and Information Science	Master of Science in Agricultural Education and Communication	Post Professional Master of Science in Occupational Therapy
Library and Information Studies	Master of Science in Civil Engineering	Research Administration
M.Ed. ASL/English Interpretation	Master of Science in Computer Engineering - Bioinformatics	Risk Management/Insurance
Master of Arts in Latin	Master of Science in Computer Engineering General Computer Science and Engineering	Social Foundations in Instructional Technology/ M.Ed
Master of Engineering Electrical and Computer Engineering	Master of Science in Construction Management	Social Work
Master of Engineering Environmental Engineering - Specialization in Water Resources Planning and Management	Master of Science in Electrical and Computer Engineering - Communications	Speech- Language Pathology
Master of Engineering in Aerospace Engineering	Master of Science in Electrical and Computer Engineering - Electronic Semiconductor Device Technology	Transportation
Master of Engineering in Industrial and Systems Engineering	Master of Science in Entomology and Nematology Specialization - Entomology	Virtual MFA in Computer Arts

Note: Includes FL distance learning programs included in the FLVC
Source: FLVC

Florida Online Programs

FCS Online Program Offerings – “Other” Programs

Associate's	
A.A. General Education	Associate of Science Office Administration - Office Software Specialist
A.S. Emergency Administration and Management	Economics
A.S. Fire Science	Economics for Business
A.S. Funeral Services	Emergency Administration and Management AAS
A.S. Parks and Leisure Services	Environmental Science
A.S. Paralegal & Legal Studies	History
Associate in Arts in General Studies	Industrial Management Technology
Associate in Science in Industrial Management	Journalism
Associate in Science in Office Administration	Office Administration
Associate in Science in Paralegal	Office Administration - Office Software Applications
Associate of Arts	Optical Management Technology
Associate of Science Aviation Operations	Opticianary
Associate of Science Emergency Management	Philosophy
Associate of Science Fire Science Technology	Pre-Law/Pre-Legal
Associate of Science Marketing Management	Professional Pilot Technology Aviation Science
Associate of Science Office Administration - Legal Office Specialist	Psychology
Associate of Science Office Administration - Office Management Specialist	The Associate in Arts Degree for University Transfer

Florida Online Programs

FCS Online Program Offerings – “Other” Programs

Certificate	Bachelor's
Airline/Aviation Management	B.A.S. Sustainability Management
Insurance Claims Adjuster	B.A.S. Public Safety Administration
Insurance Customer Services Representative	B.A.S. Technology Management
Insurance General Lines Agent	B.A.S. Veterinary Technology
Legal Office Management	Bachelor of Applied Science Degree in Organizational Management
Life Insurance Marketing	Bachelor of Applied Science in Supervision and Management
Logistics & Transportation	Bachelor of Science Degree in Human Services
Office Management	Energy Technology Management
Office Specialist	Homeland Security
Personal Lines Insurance	Information Management
Real Estate Sales Agent	Public Safety Administration
Water Quality Tech	Public Safety Management - Corrections Option
	Technology Management

Florida Online Programs

FCS Online Program Offerings – “Other” Programs

Undergraduate Certificate	
Admin Specialist General	Fire Officer II
Admin Specialist Legal	Florida Child Care
Certificate in Customer Service	Gang Investigations
Certificate in Emergency Management	Gangs Enforcement Management
Certificate in Office Management	Human Resources Administrator Certificate
Certificate in Office Specialist	Office Management Certificate
Certificate in Office Support	Office Specialist
Childcare Center Management Specialization Certificate	Office Specialist Technical Certificate
Critical Care (Advanced Technical Certificate)	Office Support
Emergency Administration and Management	Office Support (Technical Certificate)
Emergency Care (Advanced Technical Certificate)	Office Support Technical Certificate
Fire Inspector I	Online National Vocational CDA PSAV
Fire Inspector II	Sepsis (Advanced Technical Certificate)
Fire Investigator I	Veterinary Practice Management
Fire Officer I	

Florida Online Programs

ICUF Online Program Offerings – “Other” Programs

Undergraduate Certificate	Graduate Certificate
Management and Leadership	Health Care Management
Church Ministry	Human Resources Administration
	Instructional Design
Associate's	Doctorate
Paralegal Studies	Psychology
Liberal Studies	Acquisition & Contract Management
General Studies	Leadership and Management
Interdisciplinary Studies	
Management	
Fire Science	
Aviation Business Admin	
Aviation Maintenance	
Professional Aeronautics	

Florida Online Programs

ICUF Online Program Offerings – “Other” Programs

Bachelor's	Master's
Aviation Business Administration	Transformative Leadership
Aviation Maintenance	Human Services
Professional Aeronautics	Ministerial Leadership
Psychology	Management
Hospitality Management	Project Management
Organizational Management	Legal Studies
Applied Psychology	Public Administration
Legal Studies	Professional Studies
Human Resources Administration	Aeronautical Science
International Hospitality/Tourism Management	Leadership
Liberal Studies	Management to MBAA
Sociology	Space Education
Organizational Leadership	Operations Research
Management of Tech Operations	Materiel Acquisition Management
Transportation	Logistics Management
Applied Management	Human Resources Management
Management	Project Management/Info Systems
Aviation Technology	Project Management/Ops Research
Aviation Management	Acquisition & Contract Management
Construction Management	Management/Acquisition & Contract Management
Interdisciplinary Studies	Management/Human Resources Management
Public Safety Administration	Management/Information Systems
Health Care Management	Management/Logistics Management
Human Services	Disaster Relief Logistics
Practical Theology	Psychology
Fire Science Management	Instructional Design
	General Management
	TEOSL
	Social Work

Florida Online Programs

For-Profit Online Program Offerings – “Other” Programs

Undergraduate Certificate	Doctorate
Paralegal	Industrial/Organizational Psychology
Associate's	
Visual Communications	
Paralegal Studies	
Fire Science	
Culinary Operations	
Psychology	
General Studies	

Florida Online Programs

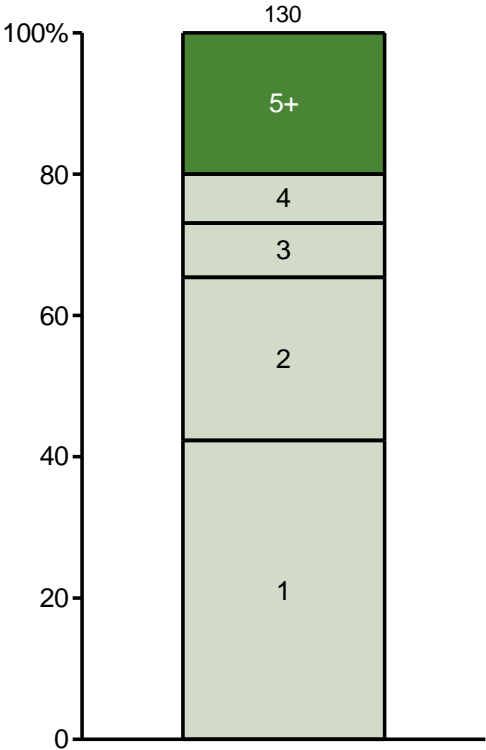
For-Profit Online Program Offerings – “Other” Programs

Bachelor's	Master's
Visual Communication - Generalist	Public Administration - Government Management
Visual Communication - Illustration	Public Administration
Psychology	Aviation Science
Psychology - Advanced Studies in Psychology	Entertainment Business - Sports Management Elective Track
Psychology - Criminal Justice	Entertainment Business
Psychology - Human Services	Creative Writing
Psychology - Organizational Psychology	Public Administration
Psychology - Substance Abuse	Psychology
Paralegal	Administration and Supervision
Alternative and Renewable Energy Management	
Construction Management	
Aviation Technology	
Aviation Management	
Crisis and Disaster Management	
Creative Writing for Entertainment	
Game Art	
Project Management and Administration - Construction	
Legal Studies	
Interdisciplinary Studies	
Public Safety Administration	
Culinary Management	
English	
Communication - Culture and Communication	
Communication - Communication and Technology	
Environmental Science	

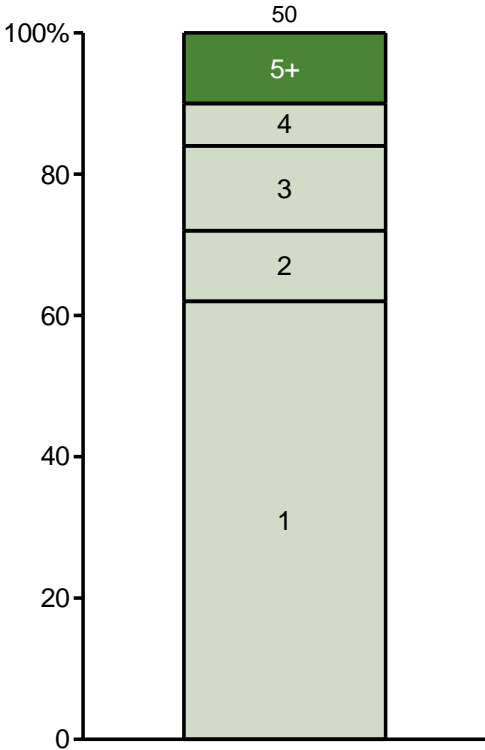
Florida Online Programs

Duplication of Online Programs

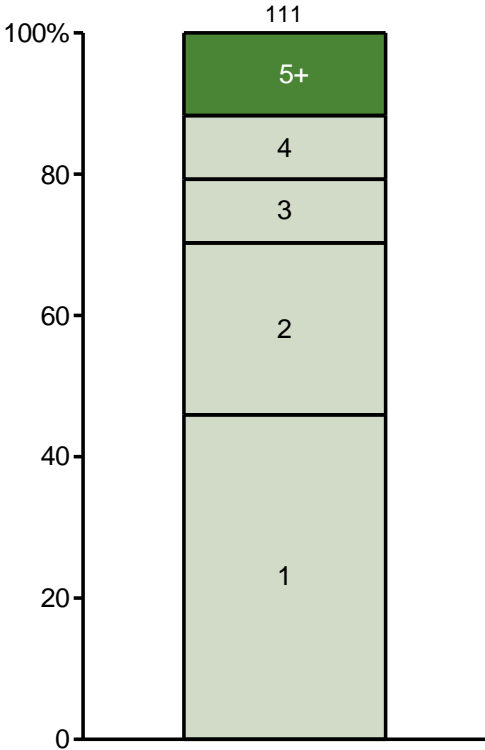
Number of Institutions Offering the Same Program, FCS and SUS



Number of Institutions Offering the Same Program, FCS



Number of Institutions Offering the Same Program, SUS



Florida Online Programs

Duplication of Online Programs

SUS Program Overlap					
Count of Institutions	Program Name	Count of Institutions	Program Name	Count of Institutions	Program Name
10	Business Administration & Management, General	4	Educational/Instructional Technology	3	Reading Teacher Education
7	Curriculum & Instruction	4	Environmental Science	3	Systems Engineering
7	Elementary Education & Teaching	4	General Studies	3	Trade & Industrial Teacher Education
6	Educational Leadership & Administration, General	4	Higher Education/Higher Education Administration	2	Adult & Continuing Education & Teaching
6	Liberal Arts & Sciences/Liberal Studies	4	Licensed Practical /Vocational Nurse Training	2	Audiology/Audiologist & Speech-Language Pathology/Pathologist
6	Public Administration	4	Nursing Practice	2	Civil Engineering, General
6	Registered Nursing/Registered Nurse	4	Nursing Science	2	Construction Engineering Technology/Technician
5	Business/Commerce, General	4	Special Education & Teaching, General	2	Education/Teaching of Individuals with Mental Retardation
5	Computer & Information Sciences, General	3	Accounting	2	Electrical and Electronics Engineering
5	Criminology	3	Aerospace, Aeronautical and Astronautical/Space Engineering	2	Entomology
5	Engineering, General	3	Computer Engineering, General	2	Environmental/Environmental Health Engineering
5	Health Services/Allied Health/Health Sciences, General	3	Emergency Medical Technology/Technician	2	Finance, General
5	Public Health, General	3	Health/Health Care Administration/Management	2	Forensic Science & Technology
4	Agricultural Teacher Education	3	Kinesiology & Exercise Science	2	Health Information/Medical Records Administration/Administrator
4	Criminal Justice/Safety Studies	3	Mechanical Engineering	2	Hospitality Administration/Management, General

Florida Online Programs

Duplication of Online Programs

SUS Program Overlap Data (Continued)					
Count of Institutions	Program Name	Count of Institutions	Program Name	Count of Institutions	Program Name
2	Library and Information Science	1	African-American/Black Studies	1	Customer Service Support/Call Center/Teleservice Operation
2	Management Information Systems, General	1	Anthropology	1	Early Childhood Education & Teaching
2	Marketing/Marketing Management, General	1	Audiology/Audiologist	1	Education, General
2	Materials Engineering	1	Biology/Biological Sciences, General	1	Engineering Technology, General
2	Mathematics, General	1	Chemistry, General	1	English Language & Literature, General
2	Non-Profit/Public/Organizational Management	1	Child Care & Support Services Management	1	English/Language Arts Teacher Education
2	Occupational Therapy/Therapist	1	City/Urban, Community & Regional Planning	1	Family & Community Services
2	Parks, Recreation & Leisure Facilities Management	1	Classics & Classical Languages, Literatures & Linguistics, General	1	Fire Science/Firefighting
2	Pharmacy	1	Clinical Psychology	1	Funeral Service & Mortuary Science, General
2	Physical Education Teaching & Coaching	1	Community Health & Preventive Medicine	1	Geography
2	Psychology, General	1	Computer & Information Sciences, Other	1	Gerontology
2	Social Work	1	Computer Technology/Computer Systems Technology	1	Health Teacher Education
2	Sport & Fitness Administration/Management	1	Computer/Info. Techn. Svcs Administration & Management, Other	1	Industrial Engineering
2	System, Networking & LAN/WAN Management/Manager	1	Criminal Justice/Police Science	1	Information Science/Studies
2	Transportation/Mobility Management	1	Criminalistics & Criminal Science	1	Insurance

Note: Count of institutions represents number of total institutions offering the program; Source: Florida Program Offering Data and CIP Code List

Florida Online Programs

Duplication of Online Programs

SUS Program Overlap Data (Continued)					
Count of Institutions	Program Name	Count of Institutions	Program Name	Count of Institutions	Program Name
1	International Relations & Affairs	1	Systems Science & Theory		
1	Law	1	Taxation		
1	Management Science	1	Teacher Education, Multiple Levels		
1	Mass Communication/Media Studies	1	Urban Education & Leadership		
1	Mental Health Counseling/Counselor	1	Veterinary/Animal Health Techn. & Veterinary Assistant		
1	Music Teacher Education	1	Women's Studies		
1	Ornamental Horticulture				
1	Philosophy & Religious Studies, Other				
1	Political Science & Government, General				
1	Psychiatric/Mental Health Services Technician				
1	Religion/Religious Studies				
1	Science Teacher Education/General Science Teacher Education				
1	Social Sciences, General				
1	Soil Science & Agronomy, General				
1	Surveying Engineering				

Note: Count of institutions represents number of total institutions offering the program; Source: Florida Program Offering Data and CIP Code List

Florida Online Programs

Duplication of Online Programs

FCS Program Overlap Data					
Count of Institutions	Program Name	Count of Institutions	Program Name	Count of Institutions	Program Name
10	Liberal Arts & Sciences/Liberal Studies	2	Management Information Systems, General	1	General Office Occupations & Clerical Services
8	Business Administration & Management, General	2	Special Education & Teaching, General	1	Geography
7	Executive Assistant/Executive Secretary	1	Aviation/Airway Management & Operations	1	History, General
5	Accounting Technology/Technician & Bookkeeping	1	Biology/Biological Sciences, General	1	Homeland Security, Law Enforcement, Firefighting and Related Protective Services, Other
5	Entrepreneurship/Entrepreneurial Studies	1	Clinical Laboratory Science/Medical Technology/Technologist	1	Hospitality Administration/Management
4	Criminalistics & Criminal Science	1	Computer & Information Sciences, General	1	Human Development, Family Studies & Related Services, Other
4	General Studies	1	Computer Engineering, General	1	Medical Insurance Coding Specialist/Coder
4	Marketing/Marketing Management, General	1	Computer Technology/Computer Systems Technology	1	Operations Management & Supervision
3	Accounting	1	Computer/Info. Techn. Svcs Administration & Management	1	Parks, Recreation & Leisure Facilities Management
3	Business/Commerce, General	1	Corrections	1	Psychiatric/Mental Health Services Technician
3	Health Information/Medical Records Administration	1	Customer Service Support/Call Center/Teleservice Operation	1	Psychology, General
3	Health/Health Care Administration/Management	1	Dental Hygiene/Hygienist	1	Public Health/Community Nurse/Nursing
3	Licensed Practical /Vocational Nurse Training	1	Early Childhood Education & Teaching	1	Science Teacher Education/General Science Teacher Education
3	System, Networking & LAN/WAN Management/Manager	1	Economics, General	1	Social Science Teacher Education
2	Elementary Education & Teaching	1	Finance, General	1	Teacher Assistant/Aide
2	Emergency Medical Technology/Technician	1	Fire Protection & Safety Technology/Technician	1	Veterinary/Animal Health Techn. & Veterinary Assistant
2	Legal Assistant/Paralegal	1	Fire Science/Firefighting		

Detailed Fact Base

Strategy Detail

National Post-Secondary Online Market

Examples of Innovative Models

Florida Persistence

Florida Online Enrollments

Florida Online Programs

Florida Tuition and Fees

Florida Employment

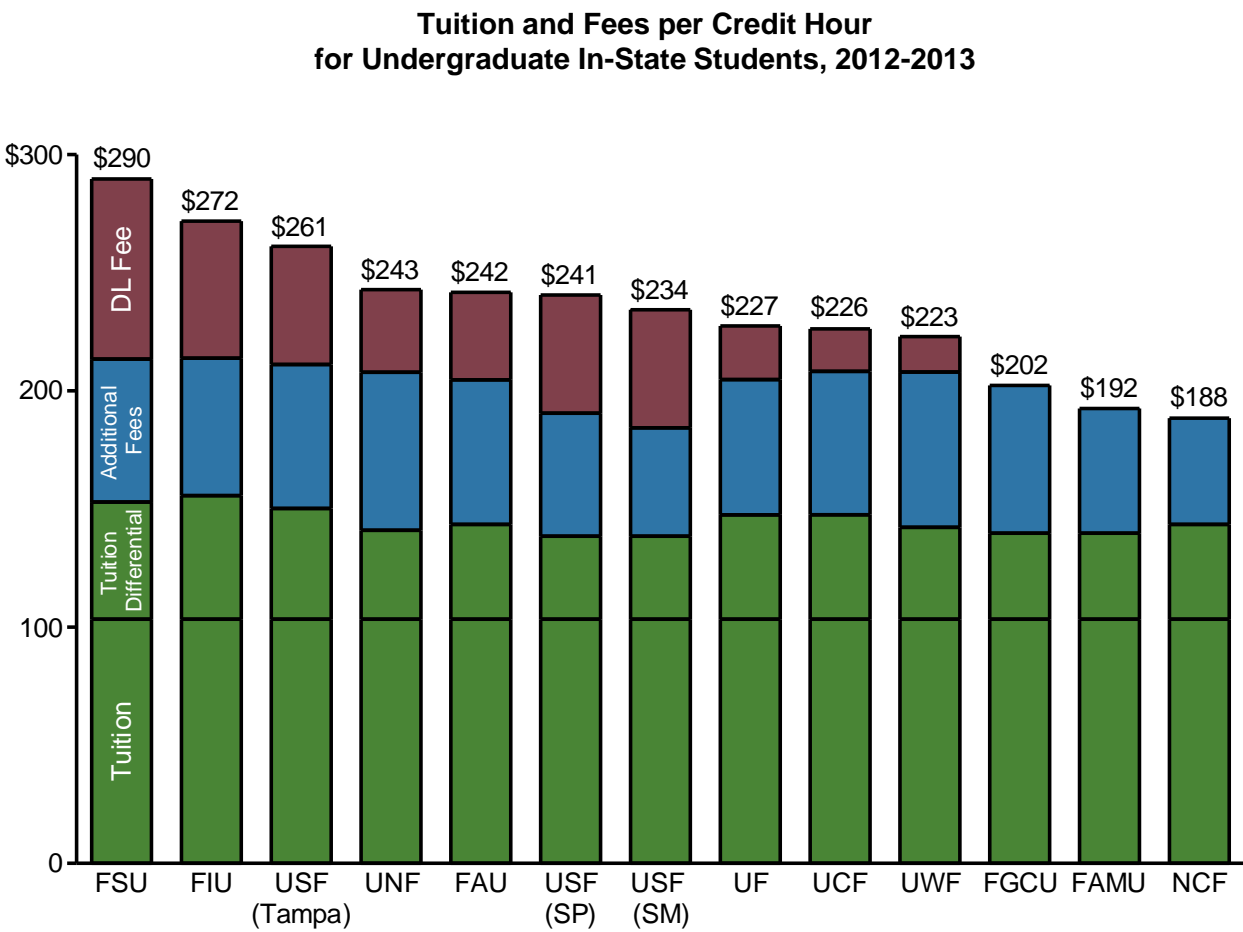
Florida Virtual Campus

Accreditation Detail

Stakeholder Interviews

Tuition and Fees

Tuition and fees across SUS schools

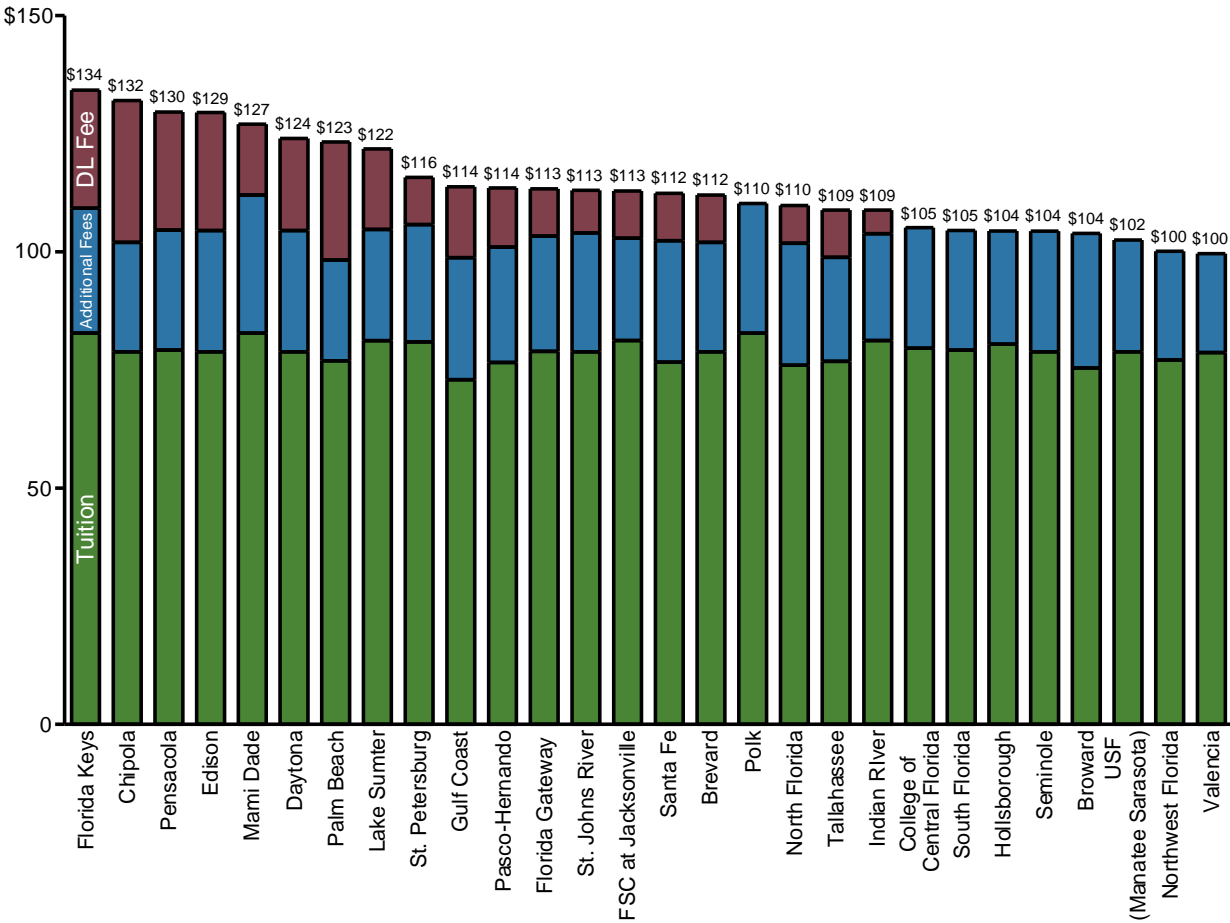


Tuition and Fees

Tuition and fees across FCS schools



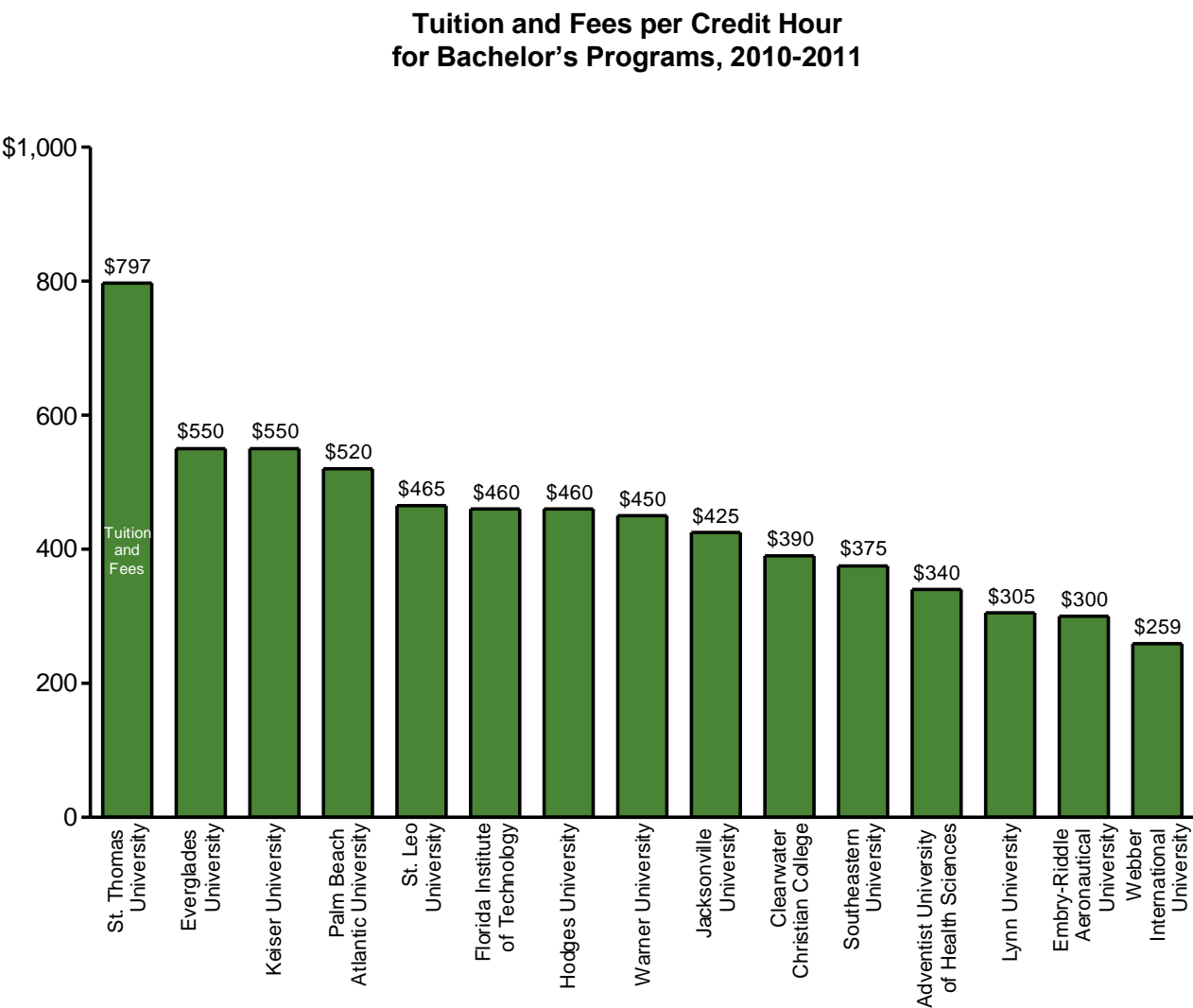
Tuition and Fees per Credit Hour for In-State Students
Pursuing an Associate’s Degree, 2012-2013



Note: Lake Sumter distance learning fee varies by course, figure used is for accounting
Source: FL DOE; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012

Tuition and Fees

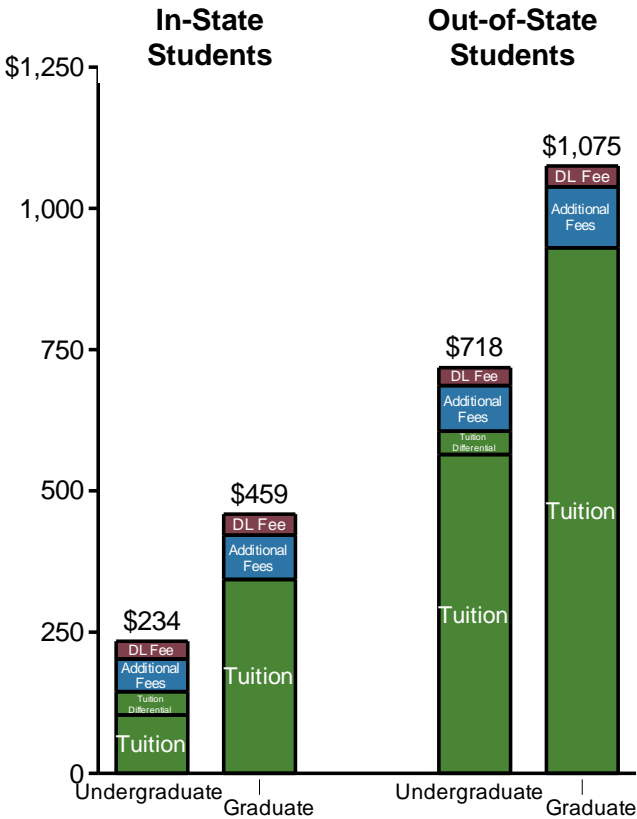
Tuition and fees across ICUF schools



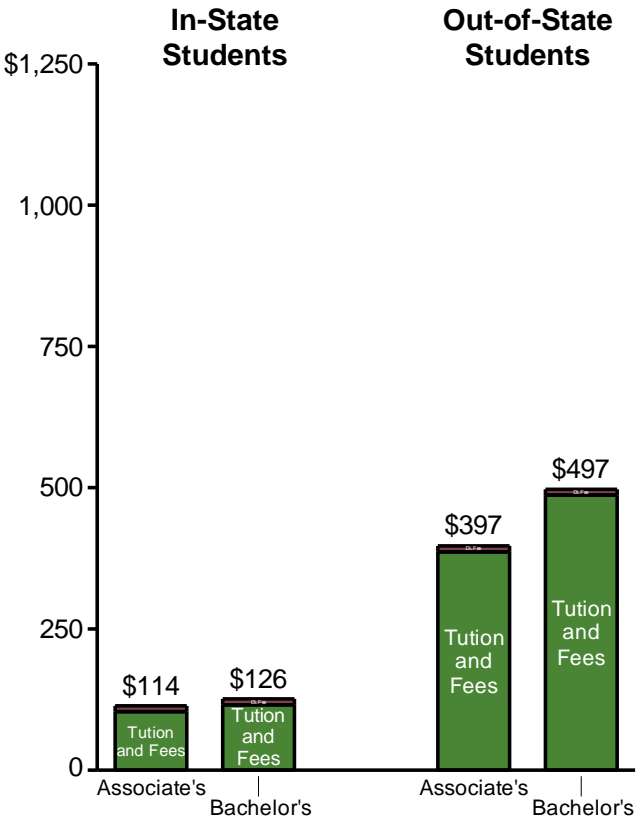
Tuition and Fees

Tuition and fees by degree level and residential status of student, SUS

Average Online Tuition and Fees per Credit Hour, SUS



Average Online Tuition and Fees per Credit Hour, FCS



Note: Unless otherwise indicated, each school's graduate distance learning fee is assumed to be equal to the undergraduate distance learning fee
Source: SUS Board of Governors; FL DOE; ~85+ Institution and expert interviews were conducted by Parthenon for the Florida engagement as well as multiple proprietary projects, from July – November 2012⁹⁰

Detailed Fact Base

Strategy Detail

National Post-Secondary Online Market

Examples of Innovative Models

Florida Persistence

Florida Online Enrollments

Florida Online Programs

Florida Tuition and Fees

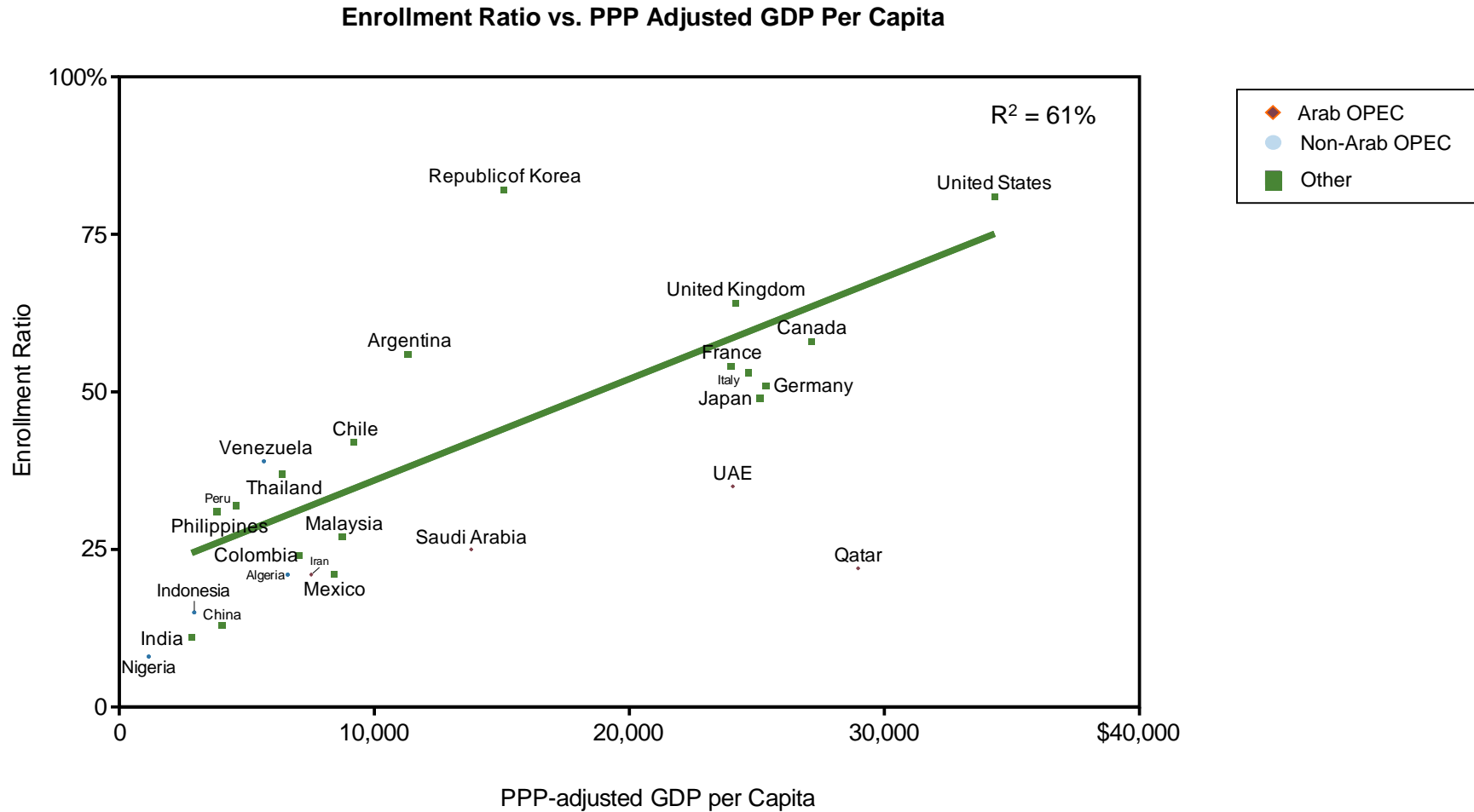
Florida Employment

Florida Virtual Campus

Accreditation Detail

Stakeholder Interviews

International Post-Secondary Enrollment vs. GDP per Capita

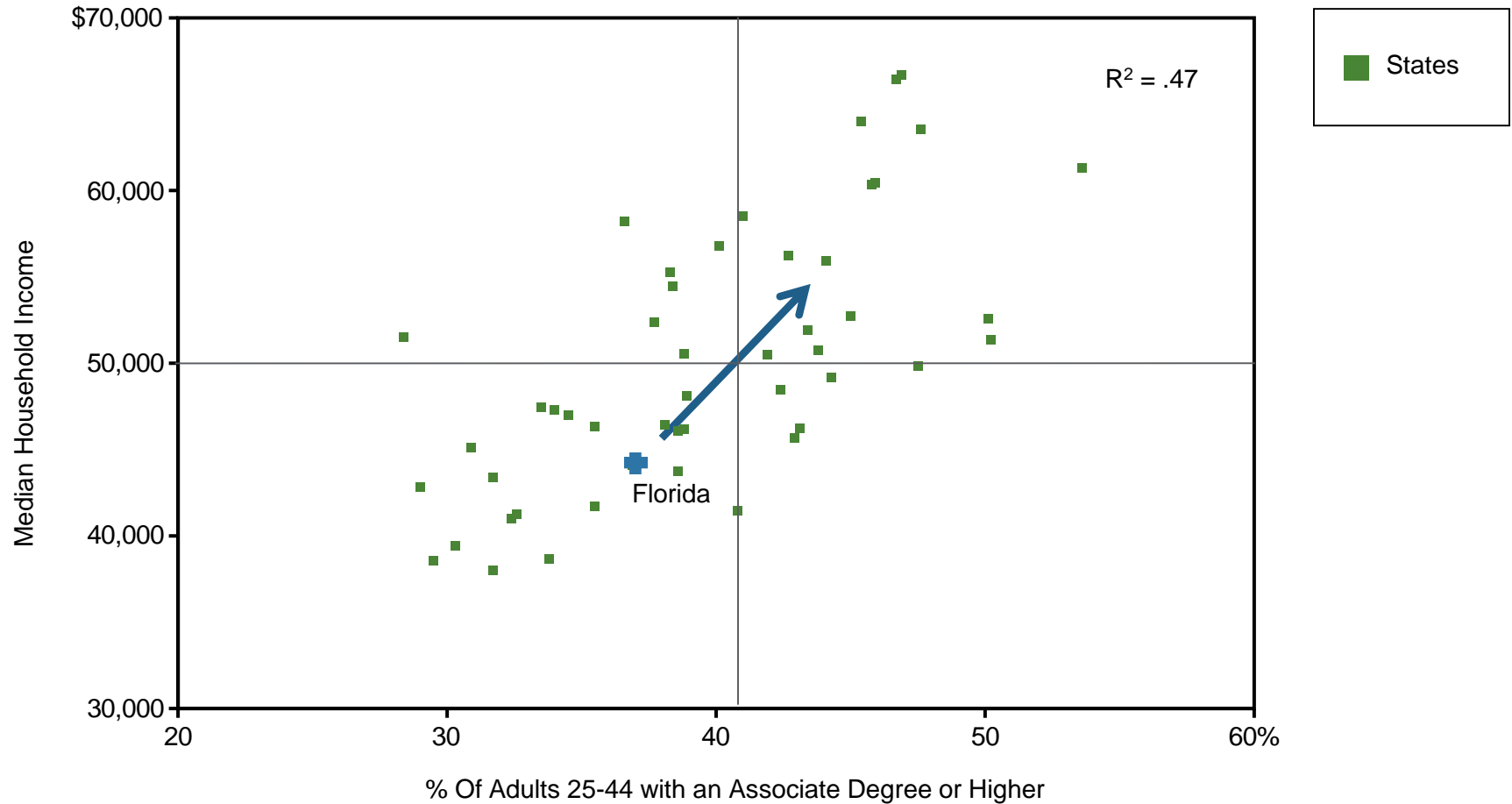


Note: UNESCO's Gross Enrolment ratio is calculated using the number of pupils enrolled in International Standard Classification of Education (ISCED) level 5 and 6 representing stages of tertiary education, regardless of age, expressed as a percentage of the population in the five-year age group following on from the secondary school leaving age; R² value does not include OPEC countries as outliers due to "oil" effect
Source: OECD, UNESCO

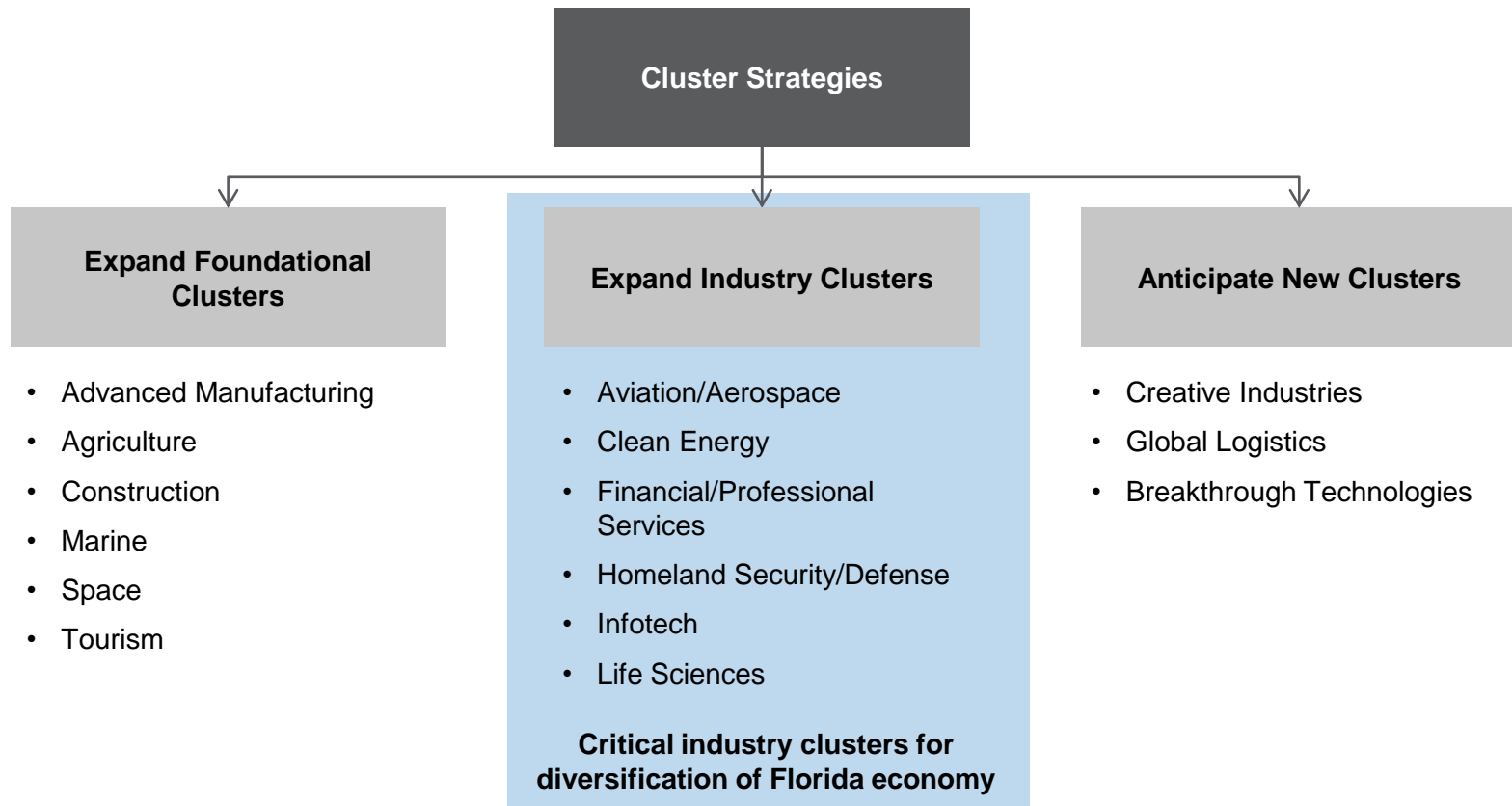
Employment

U.S. Post-Secondary Degree Attainment vs. Household Income

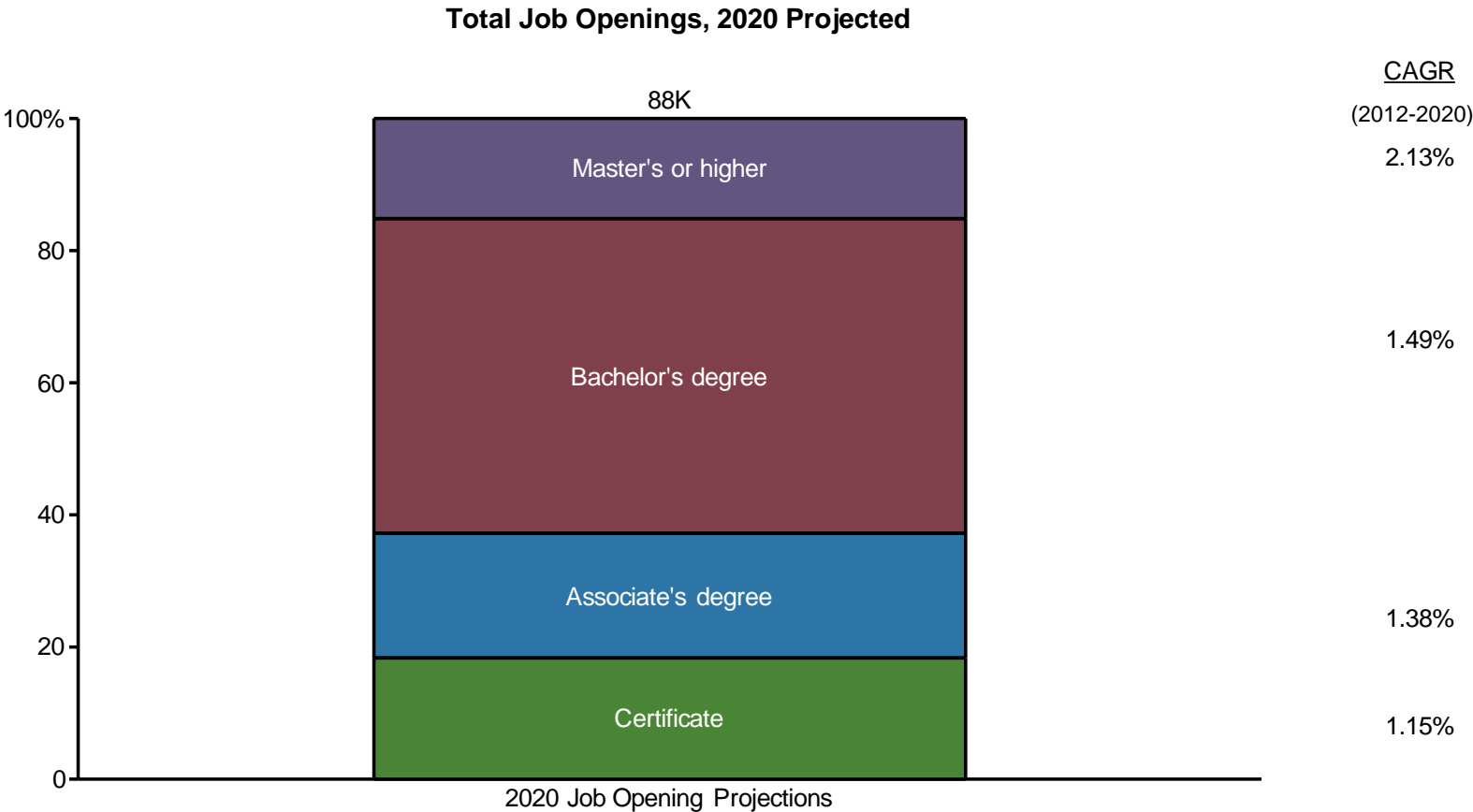
State Average % Of Adults 25-44 with an Associate Degree or Higher,
by Median Household Income, 2010



Diversifying Florida's Economy: Cluster Strategies, 2010-2015 Strategic Plan for Economic Development



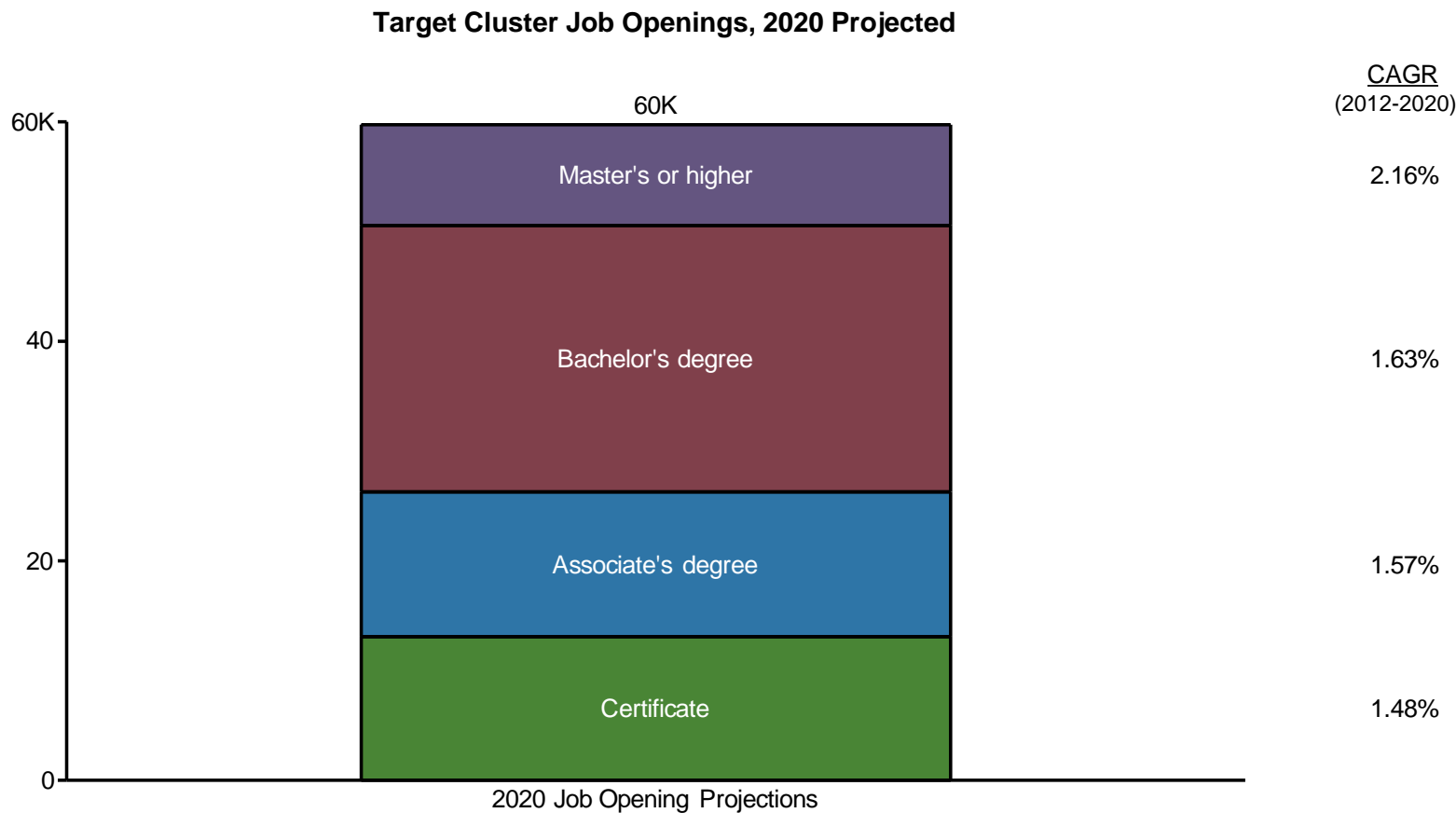
Total Jobs: Job Openings and Growth by Degree Level, 2020 Projected



Methodology:

- **All occupations codes and titles:** Bureau of Labor Statistics (Employment Projection Program, BLS)
- **Employment Projections:** Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE)
- **All job openings and growth data:** Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE)
- **Estimated 2012 Job Openings:** Derived from 2020 projections and annual growth rate.
- **Degree level needed to satisfy job requirements** for each occupation comes from Bureau of Labor Statistics - (Employment Projection Program, BLS)
- **Cluster strategy:** 2010-2015 Strategic Plan for Economic Development, put out by Enterprise Florida Inc. (EFI)
- **Occupation to cluster match:** Parthenon Analysis

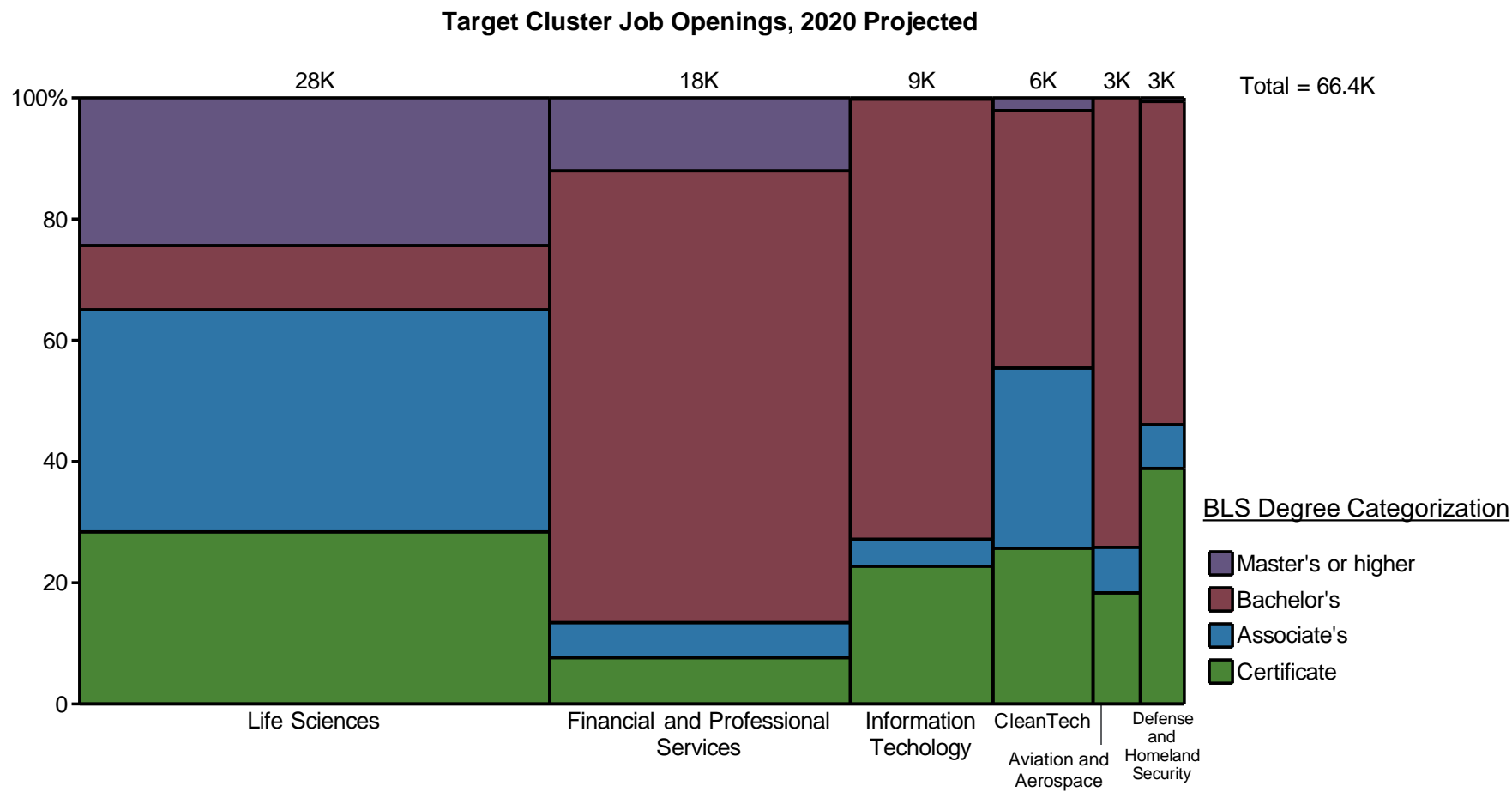
Target Clusters: Job Openings and Growth by Degree Level, 2020 Projected



Methodology:

- **All occupations codes and titles:** Bureau of Labor Statistics (Employment Projection Program, BLS)
- **Employment Projections:** Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE)
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- **Occupation to cluster match:** Parthenon Analysis

Target Clusters: Job Openings Available by Degree Level, 2020 Projected

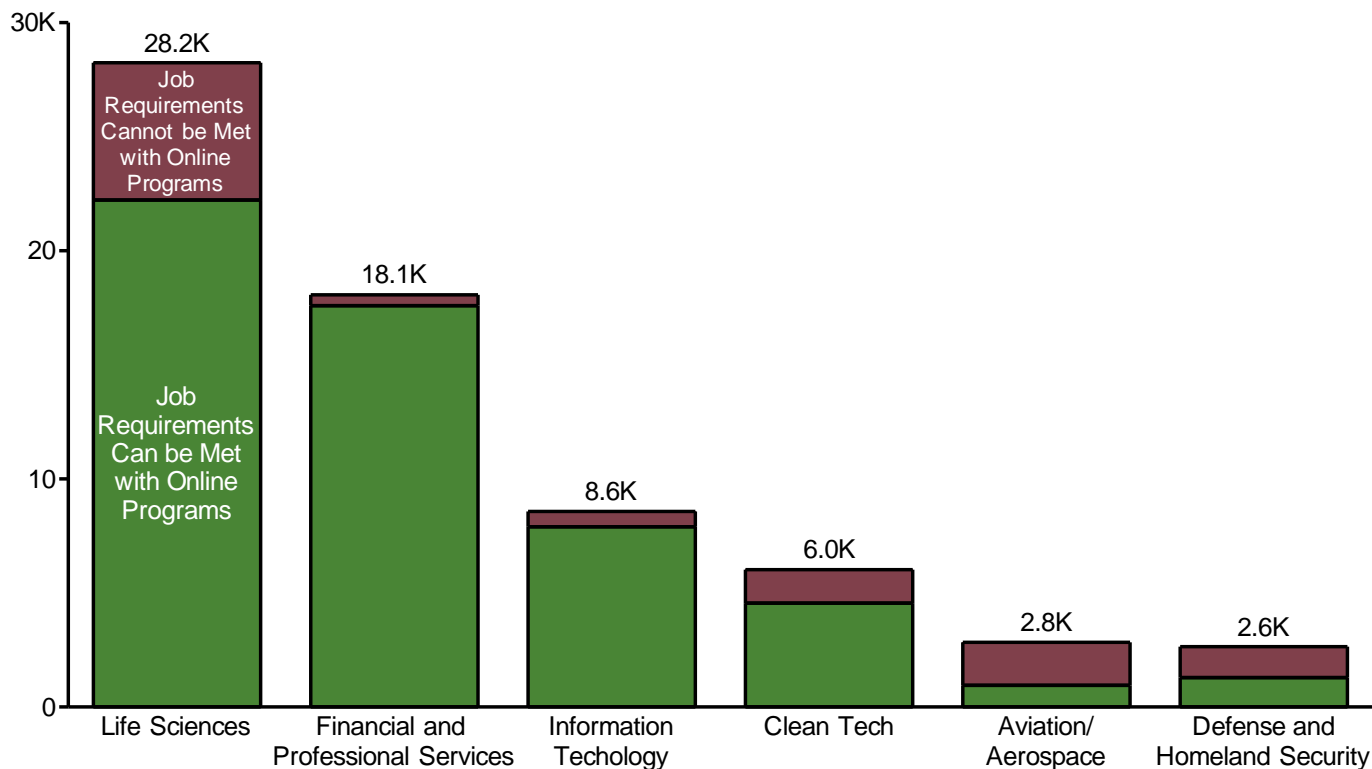


Methodology:

- All occupations codes and titles: Bureau of Labor Statistics (Employment Projection Program, BLS)
- Employment Projections: Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE)
- All job openings and growth data: Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE)
- Degree level needed to satisfy job requirements for each occupation comes from Bureau of Labor Statistics - (Employment Projection Program, BLS)
- Cluster strategy: 2010-2015 Strategic Plan for Economic Development, put out by Enterprise Florida Inc. (EFI)
- Occupation to cluster match: Parthenon Analysis

Target Clusters: Job Openings Requiring a Post-Secondary Degree, 2020 Projected

EFI Target Industry Job Openings, 2020 Projected,
that Can Be Satisfied with Current National Online-Only Degree Program Offerings



Methodology:

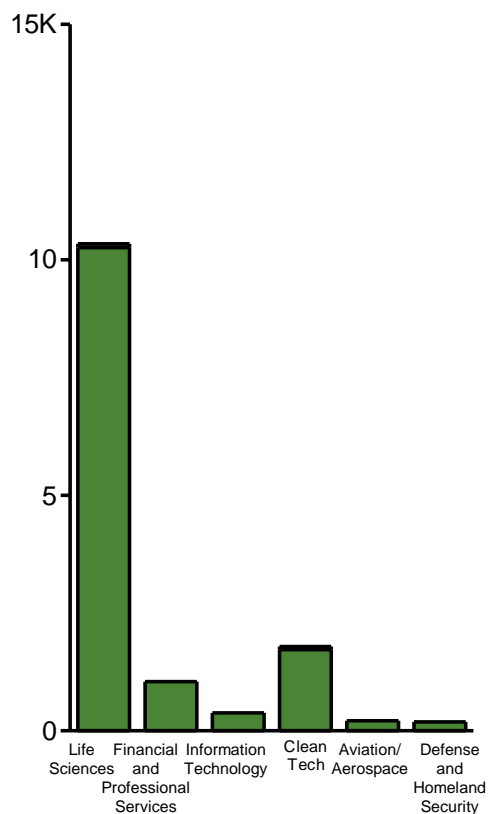
- **All occupations codes and titles:** Bureau of Labor Statistics (Employment Projection Program, BLS)
- **Employment Projections:** Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE)
- **All job openings and growth data:** Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE)
- **Degree level needed to satisfy job requirements** for each occupation comes from Bureau of Labor Statistics - (Employment Projection Program, BLS)
- **Cluster strategy:** 2010-2015 Strategic Plan for Economic Development, put out by Enterprise Florida Inc. (EFI)
- **Occupation to cluster match:** Parthenon Analysis
- **Online Program Information:** Peterson's Distance Learning Database

Note: Some occupations fell into more than one job cluster and are therefore duplicated within appropriate industry clusters

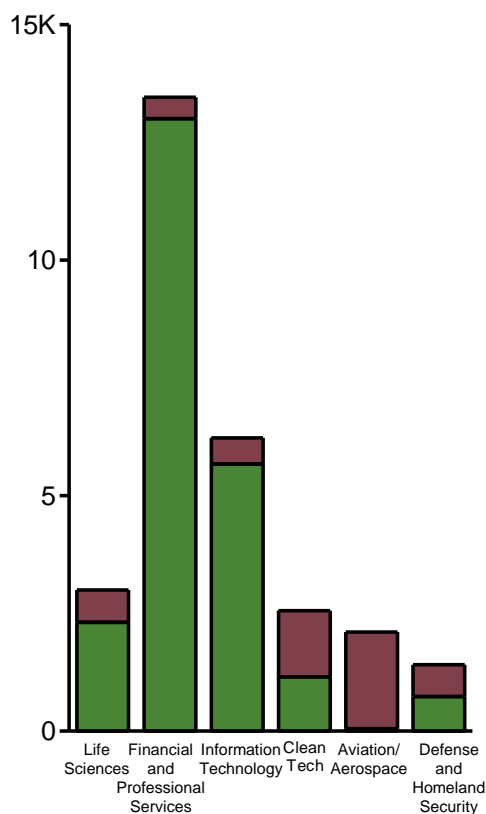
Source: BLS; Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE); 2010-2015 Strategic Plan for Economic Development, by Enterprise Florida Inc. (EFI); Peterson's Distance Learning Database of Online Programs and Degrees used to identify programs

Target Clusters: Job Openings Requiring a Post-Secondary Degree, 2020 Projected

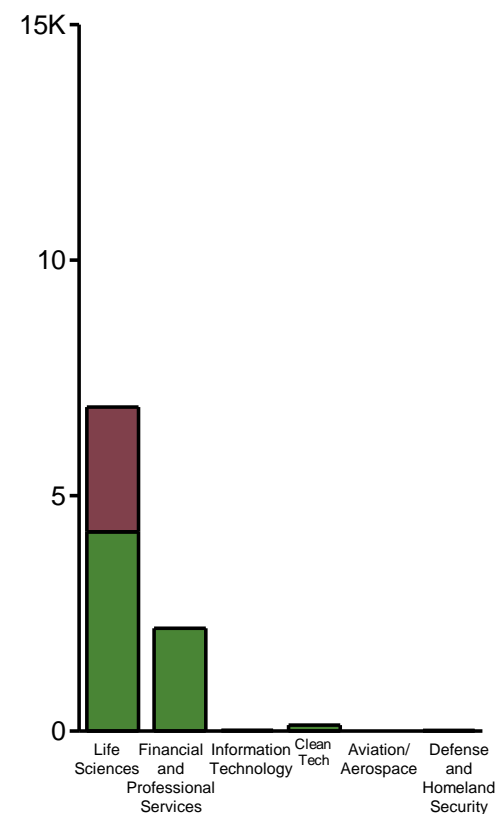
Job Openings that Can Be Satisfied with a National Online-Only Associate's Program



Job Openings that Can Be Satisfied with a National Online-Only Bachelor's Program

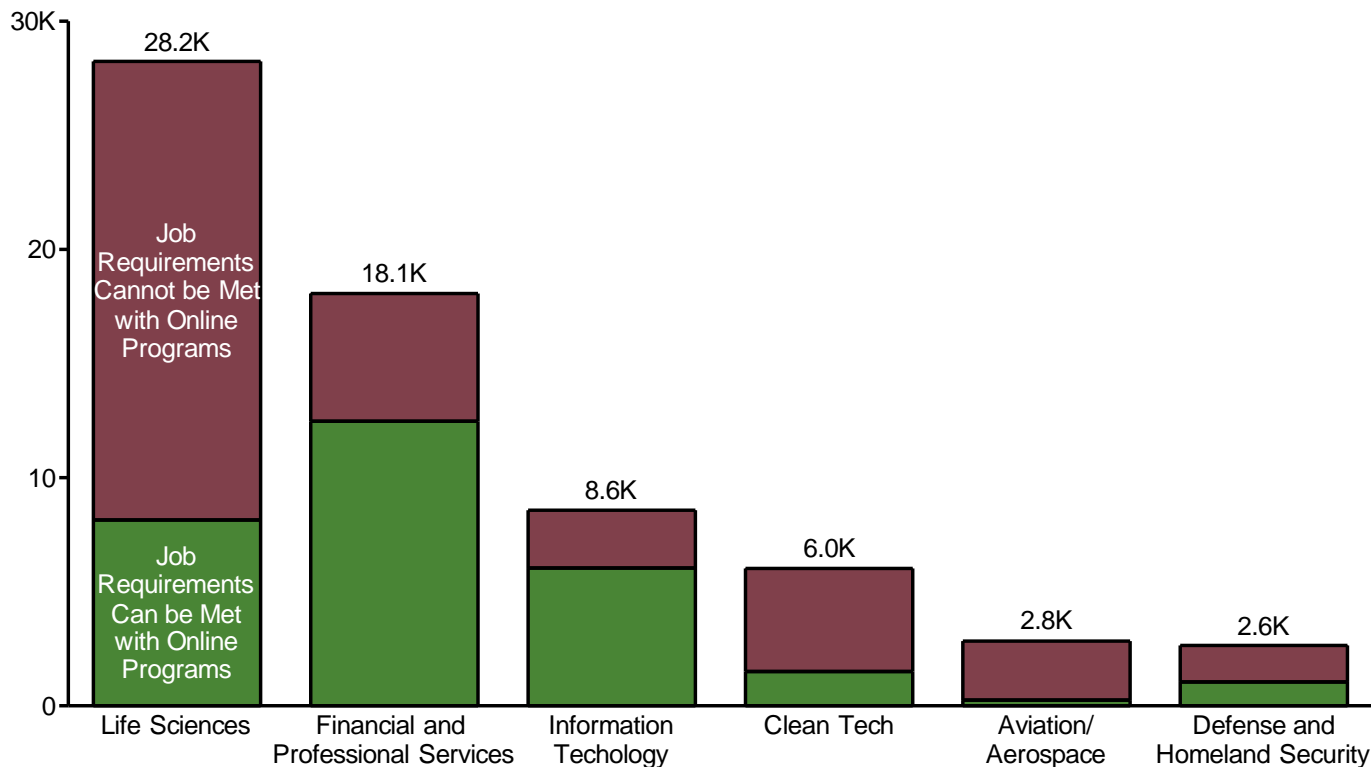


Job Openings that Can Be Satisfied with a National Online-Only Master's Program



Target Clusters: Job Openings Requiring a Post-Secondary Degree, 2020 Projected

EFI Target Industry Job Openings, 2020 Projected, that Can Be Satisfied with Current Florida FCS/SUS Online-Only Degree Program Offerings



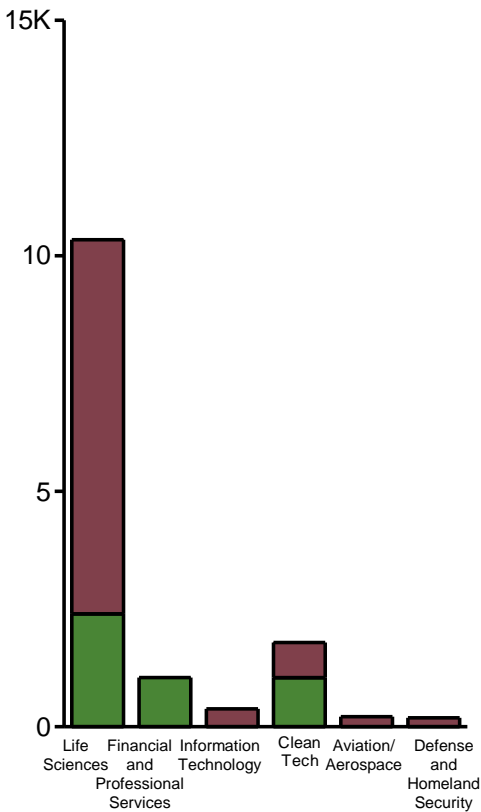
Methodology:

- **All occupations codes and titles:** Bureau of Labor Statistics (Employment Projection Program, BLS)
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- **All job openings and growth data:** Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE)
- **Degree level needed to satisfy job requirements** for each occupation comes from Bureau of Labor Statistics - (Employment Projection Program, BLS)
- **Cluster strategy:** 2010-2015 Strategic Plan for Economic Development, put out by Enterprise Florida Inc. (EFI)
- **Occupation to cluster match:** Parthenon Analysis
- **Online Program Information:** SUS/FCS data, FLVC online course crosswalk, Parthenon analysis

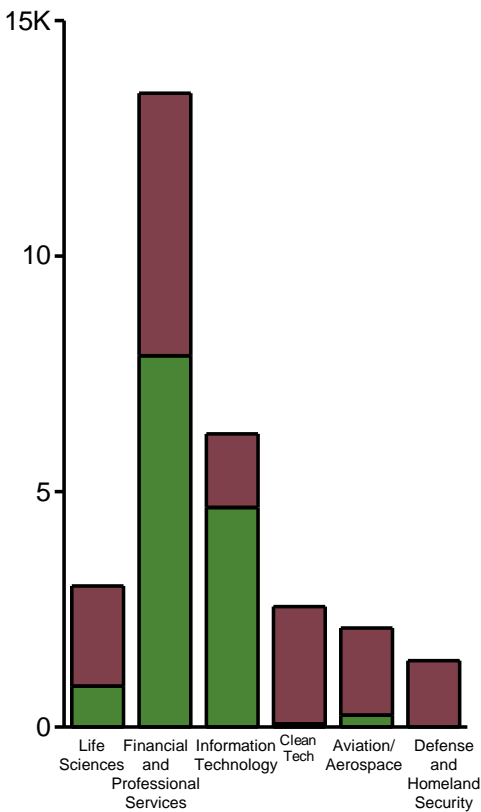
Note: Some occupations fell into more than one job cluster and are therefore duplicated within appropriate industry clusters; List of Florida online programs includes just those courses offered on the FLVC, the list excludes 31 of these courses that could not be matched to Florida program offerings list
 Source: BLS; Florida Department of Economic Opportunity's 2012-2020 Projections Statewide (FL DOE); 2010-2015 Strategic Plan for Economic Development, from Enterprise Florida Inc. (EFI); SUS/FCS program data, FLVC program name crosswalk used to identify programs

Target Clusters: Job Openings Requiring a Post-Secondary Degree, 2020 Projected

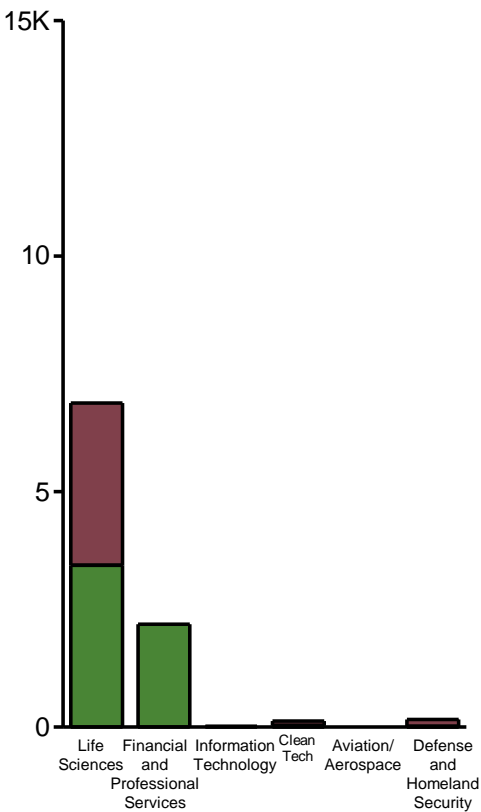
Job Offerings that Can Be Satisfied with a Florida Online-Only Associate's Program



Job Offerings that Can Be Satisfied with a Florida Online-Only Bachelor's Program



Job Offerings that Can Be Satisfied with a Florida Online-Only Master's Program

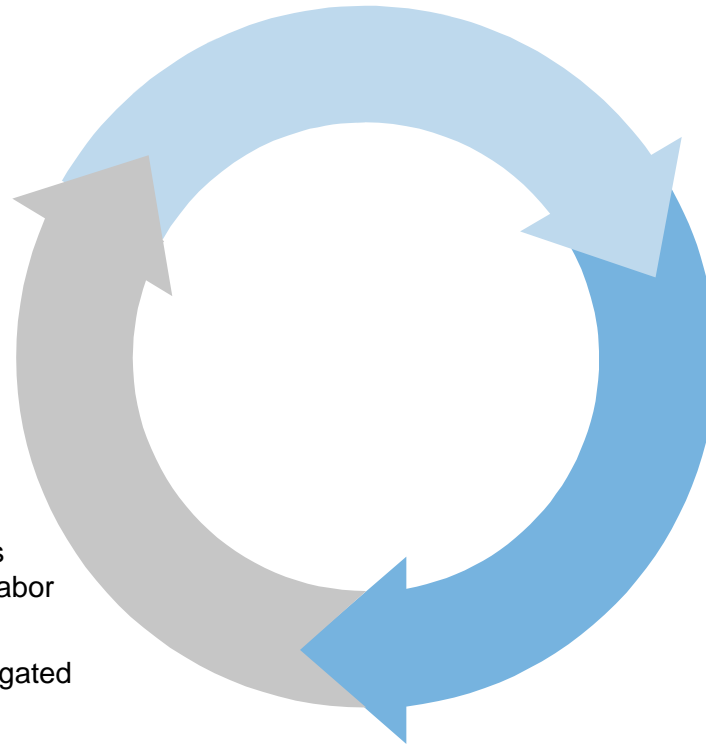


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How online can enable a broad response to labor needs

1. Labor Needs Identified

- Companies, advocacy groups or state policy organizations identify potential labor shortages
- Clear channel of communication allows labor market needs to be shared and discussed with state higher education systems



3. Labor Market Needs Met

- Scale of online programs delivers degree/certificate holders to the labor market
- Labor shortage eliminated or mitigated

2. Higher Education System Responds

- SUS and FCS incorporate labor market feedback into new program designs, focusing on online programs
- Online can enable broader response as one program can be disseminated to students across the state

Detailed Fact Base

Strategy Detail

National Post-Secondary Online Market

Examples of Innovative Models

Florida Persistence

Florida Online Enrollments

Florida Online Programs

Florida Tuition and Fees

Florida Employment

Florida Virtual Campus

Accreditation Detail

Stakeholder Interviews

Overview of the Florida Virtual Campus

Origins

- The Florida Virtual Campus was created out of the Florida Distance Learning Consortium, the Florida Center for Library Automation, the Florida Center for Advising and Academic Support and the College Center for Library Automation
- House Bill 5201 established the Florida Virtual Campus to:

“Provide access to online student and library support services and to serve as a statewide resource and clearinghouse for technology-based public postsecondary education distance learning courses and degree programs”

Mandate

- HB 5201 laid out a series of requirements for the operations of the FLVC and its distance learning catalog. The bill requires the FLVC to provide the following service (additional detail and status of these service requirements can be found on the following pages):
 - Develop and manage a library information portal and automated library management tools
 - Develop and manage an internet-based catalog of distance learning courses
 - Implement an online admissions application process for transient students
 - Develop and manage a computer-assisted student advising system
 - License and acquire electronic library resources
 - Promote and provide recommendations concerning the use and distribution of open-access textbooks
 - Provide help desk support to institutions and students and to identify and evaluate new technologies and instructional methods
 - Provide for the transfer of assets and liabilities of the Florida Distance Learning Consortium, the Florida Center for Library Automation, the College Center for Library Automation, 75 and FACTS.org to the Florida Virtual Campus

Inclusion

- Institutions charging a distance learning fee must list the course on the FLVC
- Institutions have discretion as to listing courses not charging a distance learning fee: some list all online courses and others only list courses with an associated distance learning fee
- ICUF institutions currently listing courses will be removed; they may be added back in through specific service agreements covering the cost of inclusion (likely based on the 3% fee + usage costs utilized for eResources on the library side of the FLVC)

Usage

- From July 1, 2011 through June 30, 2012 the Distance Learning Catalog received 109,794 visitors, who viewed an average of 7.2 pages and spent 4.4 minutes on the site
- 32,283 courses were listed on the Distance Learning Catalog from Fall 2011-Summer 2012, as well as 654 current degree programs (including certificate programs)

Statutes (Detail to follow)

- The key statutes establishing and defining the FLVC and its predecessors are 1006.73, 1004.09
- The primary statutes responsible for regulating the fees charged for distance learning are 1009.23 and 1009.24

Florida Virtual Campus

Status of FLVC Service Provisions

Services to be provided by the FLVC:	Implementation Status:
<ul style="list-style-type: none"> Library information portal and automated library management tools 	<ul style="list-style-type: none"> Discovery tool – Separate SUS/FCS tools currently available. Working on project plan to combine into a single tool. Expected completion Summer 2013 eResources – Separate SUS/FCS eResources and licensing processes currently available. Working on project plan to combine into a single process by Summer 2013 Library Management System – SUS and FCS both on Aleph ILS. Decision in mid-November on how/when to combine Digital archives – In place for SUS. Inclusion of FCS deferred (low priority)
<ul style="list-style-type: none"> Statewide Internet-based catalog of distance learning courses, degree programs, and resources 	<ul style="list-style-type: none"> In place, but requires modernization and improvement. Project to redesign and modernize was just approved. Targeted completion date of test environment late Spring 2013, in anticipation of Fall 2013 roll out to institutions
<ul style="list-style-type: none"> Implement a streamlined, automated, online admissions application process for undergraduate transient students 	<ul style="list-style-type: none"> Expected completion December 1, 2012
<ul style="list-style-type: none"> Develop and manage a statewide computer-assisted student advising system 	<ul style="list-style-type: none"> In place for SUS and FCS. Gathering of customer requirements for future changes underway
<ul style="list-style-type: none"> Negotiate and license statewide eResources 	<ul style="list-style-type: none"> Separate SUS/FCS eResources and licensing processes currently available. Working on project plan to combine into a single process by Summer 2013. Next steps to include Distance Learning in licensing process
<ul style="list-style-type: none"> Provide recommendations on the use and distribution of open-access textbooks and education resources 	<ul style="list-style-type: none"> Past efforts include symposium in 2012 and development of Orange Grove Text Plus open eTextbook initiative. Future enhancements TBD
<ul style="list-style-type: none"> Provide appropriate help desk support, and training and consultation 	<ul style="list-style-type: none"> Project underway to consolidate FCS library and FCAAS Help Desks. Full consolidation of all help and support services targeted for July 2013. Project identified to consolidate training and consultation, but on hold due to lack of resources
<ul style="list-style-type: none"> Identify and evaluate new technologies and instructional methods 	<ul style="list-style-type: none"> Ongoing effort

Cost of Implementing Critical FLVC Service Provisions – Online Catalog

Website Redesign and Centralization
\$500,000
(\$200K recurring, \$300K non-recurring)

**Modernization and Long-Term Support
of the Distance Learning Catalog**
\$515,000
(\$365K recurring, \$150K non-recurring)

**Stabilization and Implementation of
Common Web Infrastructure Platform**
\$510,000
(\$250K recurring, \$260K non-recurring)

- Consolidate, rework, or decommission content on legacy websites into central FLVC.org website. Identify customer requirements for new functionality, using focus groups, user tests, surveys, and statistics. Create and maintain a centralized software infrastructure that is scalable to meet the new consolidated and statewide requirements for FLVC, integrating a single-sign on authentication approach that allows users to log in once and access multiple programs during a session. Redesign and deploy the website to meet long-term customer needs
- Redesign and recode the existing distance learning course and degree program catalog from Cold Fusion to a more flexible, expandable and maintainable programming environment (e.g., .Net). Implement features and functions that will allow FLVC to meet its statutorily mandated duties while including options for anticipated future needs of the member institutions and special projects or populations. Identified enhancements include: user customization and custom results, expanded searching and retrieval options, student calendars, career and salary information, improved reporting and institutional data loading options, single sign-on, scheduling tools, degree audits, critical and concierge advising functions, eCommerce options to link students to the resources they need (e.g. textbooks), and expanded adoption and access to free and open access eTextbooks
- The stabilization, implementation and delivery of a common web platform, including support for mobile browsers and applications is critical to the success and support of current and planned services for FLVC. Analysis of the recent instability and outage in the FLVC website revealed major shortcomings in the technical platforms in hardware, software, design and engineering. These disparate and aging systems and supporting infrastructure require reengineering and rebuilding to effectively maintain current and mandated future services. The technology is dated and susceptible to single points of failure. A short-term plan is now in place to address stabilization and availability of the current site and now attention to the services and applications is a priority. This request will provide for investment, design, development, training and deployment of the new common infrastructure platform

Florida Virtual Campus

Florida Virtual Campus Participation

In 2011-2012, 38 Institutions Listed Courses on the Florida Virtual Campus

Florida College System		State University System of Florida	ICUF
<ul style="list-style-type: none"> • Brevard Community College • Broward College • Chipola College • College of Central Florida • Daytona State College • Edison State College • Florida Gateway College (formerly Lake City) • Florida Keys Community College • Florida State College at Jacksonville • Gulf Coast State College • Hillsborough Community College • Indian River State College • Lake Sumter Community College 	<ul style="list-style-type: none"> • Miami Dade College • North Florida Community College • Northwest Florida State College • Palm Beach State College • Pasco-Hernando Community College • Pensacola State College • Polk State College • Santa Fe College • Seminole State College • South Florida State College • St. Johns River State College • St. Petersburg College • Tallahassee Community College • Valencia College 	<ul style="list-style-type: none"> • Florida Atlantic University • Florida Gulf Coast University • Florida International University • Florida State University • University of Central Florida • University of Florida • University of North Florida • University of South Florida • University of West Florida 	<ul style="list-style-type: none"> • Lynn University • Saint Leo University

Florida Statutes Limiting and Regulating the Fees Which can be Assessed on Distance Learning Courses

In 2011, Florida Statute 1009.23 established the Distance Learning Fee, contingent upon the course being greater than 80% distance learning, listed in the Distance Learning Catalog, and directly attributable to the incremental costs associated with distance learning

(16)(a) Each Florida College System institution may assess a student who enrolls in a course listed in the Florida Higher Education Distance Learning Catalog, established pursuant to s. [1004.09](#), a per-credit-hour distance learning course user fee. For purposes of assessing this fee, a distance learning course is a course in which at least 80 percent of the direct instruction of the course is delivered using some form of technology when the student and instructor are separated by time or space, or both.

(b) The amount of the distance learning course user fee may not exceed the additional costs of the services provided which are attributable to the development and delivery of the distance learning course. If a Florida College System institution assesses the distance learning course user fee, the institution may not assess any other fees to cover the additional costs. By September 1 of each year, each board of trustees shall report to the Division of Florida Colleges the total amount of revenue generated by the distance learning course user fee for the prior fiscal year and how the revenue was expended.

(c) The link for the catalog must be prominently displayed within the advising and distance learning sections of the institution's website, using a graphic and description provided by the Florida Distance Learning Consortium, to inform students of the catalog.

(17) Each Florida College System institution that accepts transient students, pursuant to s. [1004.091](#), may establish a transient student fee not to exceed \$5 per distance learning course for processing the transient student admissions application.

In 2012, Florida Statute 1009.24 reinforced the same restrictions on the distance learning fee, and altered language to mandate inclusion on the new Florida Virtual Campus

(17)(a) A state university may assess a student who enrolls in a course listed in the distance learning catalog, established pursuant to s. [1006.73](#), a per-credit-hour distance learning course fee. For purposes of assessing this fee, a distance learning course is a course in which at least 80 percent of the direct instruction of the course is delivered using some form of technology when the student and instructor are separated by time or space, or both.

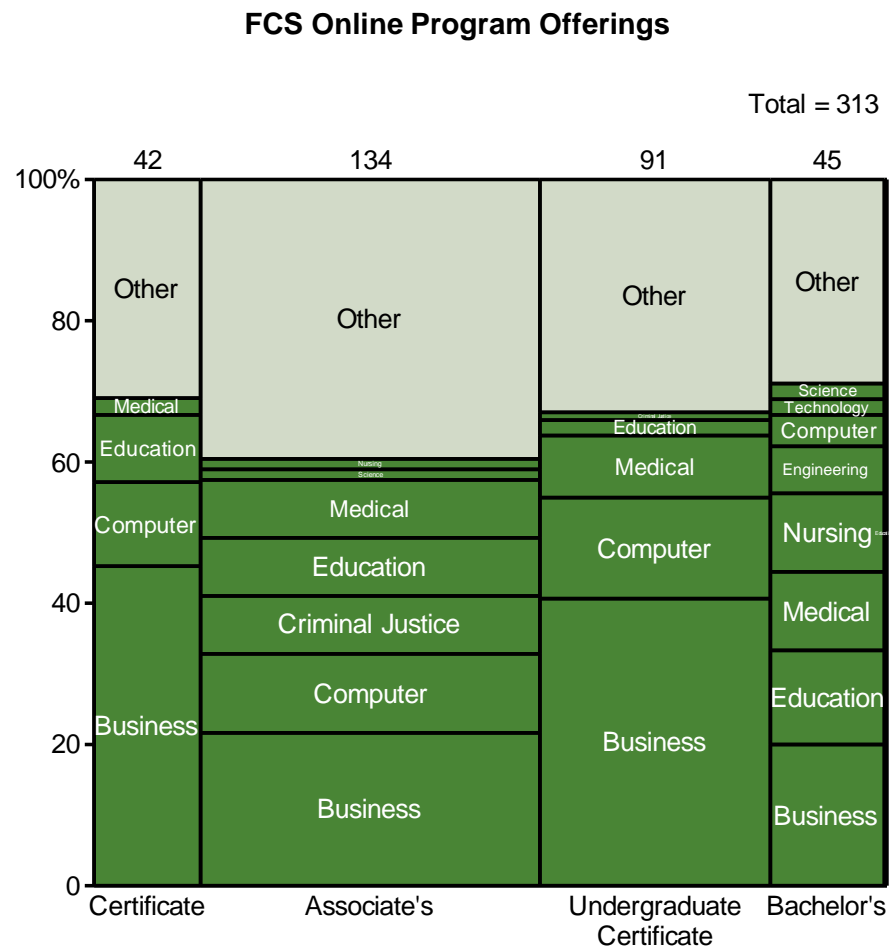
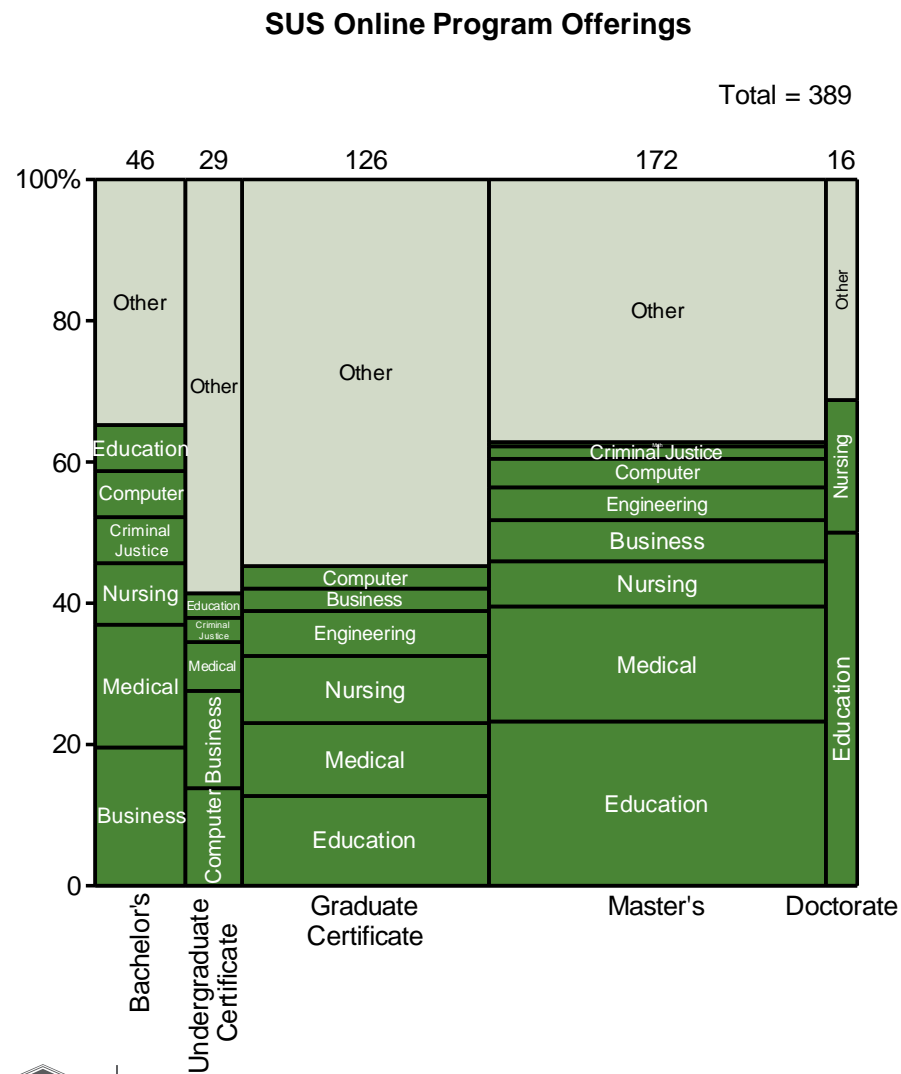
(b) The amount of the distance learning course fee may not exceed the additional costs of the services provided which are attributable to the development and delivery of the distance learning course. If the distance learning course fee is assessed by a state university, the institution may not assess duplicative fees to cover the additional costs.

(c) The link for the catalog must be prominently displayed within the advising and distance learning sections of the institution's website, using a graphic and description provided by the Florida Virtual Campus, informing students of the catalog.

Florida Board of Governors Regulations [7.003(18)(f)] authorizes each university board of trustees to assess a distance learning fee, which will have varied amounts

Florida Virtual Campus

SUS and FCS Online Program Offerings



Florida Virtual Campus Statutory Language – Florida Statute 1006.73 (1/3)

1006.73 Florida Virtual Campus

- (1) The Florida Virtual Campus is established to provide access to online student and library support services and to serve as a statewide resource and clearinghouse for public postsecondary education distance learning courses and degree programs. The primary purposes of the Florida Virtual Campus are to:
 - (a) Establish a single library automation system and associated resources and services that all public postsecondary education institutions will use to support their learning, teaching, and research needs.
 - (b) Enhance and expand educational access and increase public postsecondary education degree attainment across the state.
 - (c) Address the educational needs of traditional students, place-bound students, time-bound students, and adult learners.
 - (d) Increase workforce skills and expand professional development opportunities.
- (2) The chancellors of the Florida College System and the State University System shall exercise joint oversight of the Florida Virtual Campus and shall establish its governance and reporting structure, administrative and operational guidelines and processes, staffing requirements, and operational budget. All data center services needed by the Florida Virtual Campus shall be provided by a primary data center established pursuant to ss. [282.201](#) and [1004.649](#).
 - (a) In carrying out the purposes of this section:
 1. The campus is not an “agency” as defined in s. [20.03](#)(11) and is not subject to chapter 287.
 2. The campus shall be deemed to be acting as an instrumentality of the state for purposes of sovereign immunity pursuant to s. [768.28](#)(2).
 3. All records of the campus are public records unless made confidential or exempt from law.
 - (b) The campus shall maintain an unencumbered balance of not less than 5 percent of its approved operating budget.
 - (c) The campus may secure comprehensive general liability coverage, professional liability coverage, property and casualty coverage, and any other insurance coverage deemed appropriate by the chancellors.
 - (d) The campus may contract for administrative services with a public postsecondary education institution. The administrative overhead costs charged by the institution may not exceed the actual cost of providing the services and shall require a specific appropriation in the General Appropriations Act.
- (3) The Florida Virtual Campus, upon approval of the chancellors of the Florida College System and the State University System, shall have authority to apply for and accept funds, grants, gifts, and services from local, state, or federal governments or any of their agencies or from any other public or private source and is authorized to use funds derived from these sources to defray administrative costs and implement programs as may be necessary to support the services and resources provided by the campus.
- (4) The Florida Virtual Campus shall be subject to the audit requirements of s. [11.45](#) for Florida College System institutions and state universities. The chancellors of the Florida College System and the State University System shall jointly serve as the governing body of the campus for purposes of the audit and all related activities.
- (5) The Florida Virtual Campus shall:
 - (a) Develop and manage a library information portal and automated library management tools for use by the Florida College System institutions and state universities. The library information portal and automated library management tools shall include, but are not limited to, the following services and functions (*next page*):

Florida Virtual Campus Statutory Language – Florida Statute 1006.73 (2/3)

1. A shared Internet-based catalog and a discovery tool that allow a user to search and, if authorized, access the aggregate library holdings of the state's public postsecondary education institutions. The catalog and discovery tool shall allow the user to search the library holdings of one institution, selected institutions, or all institutions and, to the extent feasible, shall include an interlibrary loan function that ensures the authorized user can access the required library holding.
2. An Internet-based searchable collection of electronic resources which shall include, but not be limited to, full-text journals, articles, databases, and electronic books that the Florida Virtual Campus licenses pursuant to s. [1006.72](#).
3. An integrated library management system and its associated services which all public postsecondary education institution academic libraries must use for purposes of acquiring, cataloging, circulating, and tracking library material.
4. A statewide searchable database that includes an inventory of digital archives and collections held by public postsecondary education institutions.
- (b) Develop and manage a statewide Internet-based catalog of distance learning courses, degree programs, and resources offered by public postsecondary education institutions which is intended to assist in the coordination and collaboration of articulation and access pursuant to parts II and III of chapter 1007. The campus shall establish operational guidelines and procedures for the catalog which must:
 1. Require participating institutions to provide information concerning the distance learning course to include information on the availability of the course; the type of required technology; any prerequisite course or technology competency or skill; the availability of academic support services and financial aid resources; and course costs, fees, and payment policies.
 2. Require that distance learning courses and degree programs meet applicable accreditation standards and criteria.
 3. Require that, at a minimum, the catalog is reviewed at the start of each academic semester to ensure that distance learning courses and degree programs comply with all operational guidelines and procedures.
 4. Use an Internet-based analytic tool that allows for the collection and analysis of data, including, but not limited to:
 - a. The number and type of students who use the catalog to search for distance learning courses and degree programs.
 - b. The number and type of requests for information on distance learning courses and degree programs that are not listed in the catalog.
 - c. A summary of specific requests by course type or course number, delivery method, offering institution, and semester.
 5. Periodically obtain and analyze data from the Florida College System and the State University System concerning:
 - a. Costs of distance learning courses and degree programs.
 - b. Graduation and retention rates of students enrolled in distance learning programs.
 - c. Distance learning course completion.
- (c) Implement a streamlined, automated, online admissions application process for undergraduate transient students who are currently enrolled and pursuing a degree at a public postsecondary education institution and who enroll in a course offered by a public postsecondary education institution that is not the student's degree-granting institution. The Florida Virtual Campus shall work with the Florida College System and the State University System to implement this process which requires all Florida College System institutions and state universities to:
 1. Use the transient student admissions application available through the statewide computer-assisted student advising system established pursuant to paragraph (d). This admissions application is the only application required for the enrollment of a transient student as described in this paragraph.
 2. Implement the financial aid procedures required by the transient student admissions application process.
 3. Transfer credit awarded by the institutions offering the course to the transient student's degree-granting institution.

Florida Virtual Campus Statutory Language – Florida Statute 1006.73 (3/3)

4. By December 1, 2012, provide for an interface between the institutional advising system and the statewide computer-assisted student advising system established pursuant to paragraph (d) in order to electronically send, receive, and process the transient student admissions application.
- (d) Develop and manage a statewide computer-assisted student advising system which shall support the process of advising, registering, and certifying students for graduation and include a degree audit and an articulation component. The Florida College System institutions and state universities shall interface institutional advising systems with the statewide computer-assisted student advising system. At a minimum, the statewide computer-assisted student advising system shall:
 1. Allow a student to access the system at any time, search public postsecondary education institutions, and identify course options that will meet the requirements of a selected path toward a degree.
 2. Audit transcripts of students enrolled in a public postsecondary education institution to assess current academic standing, the impact of changing majors or institutions, the requirements for a student to transfer to another institution, and all requirements necessary for graduation.
 3. Serve as the official statewide repository for the common prerequisite manual, admissions information for transferring programs, foreign language requirements, residency requirements, and statewide articulation agreements.
 4. Provide information relating to career descriptions and corresponding educational requirements, admissions requirements, and available sources of student financial assistance.
 5. Provide the admissions application for transient students pursuant to paragraph (c) which must include the electronic transfer and receipt of information and records for:
 - a. Admissions and readmissions.
 - b. Financial aid.
 - c. Transfer of credit awarded by the institution offering the course to the transient student's degree-granting institution.
 - (e) Coordinate the negotiation of statewide licensing of electronic library resources and preferred pricing agreements, issue purchase orders, and enter into contracts for the acquisition of distance learning resources, student and library support services, electronic resources, and other goods and services necessary to carry out its duties under this section.
 - (f) Promote and provide recommendations concerning the use and distribution of open-access textbooks and education resources as a method for reducing costs and work with public postsecondary education institutions in developing a standardized process for the review and approval of open-access textbooks.
 - (g) Provide appropriate help desk support and training and consultation services to institutions and students using the services and resources of the Florida Virtual Campus.
 - (h) Identify and evaluate new technologies and instructional methods that can be used for improving distance learning instruction, student learning, the efficient delivery of student support services, and the overall quality of undergraduate distance learning courses and degree programs.
 - (6) Beginning September 30, 2013, and annually thereafter, the chancellors of the Florida College System and the State University System shall jointly publish a report regarding the activities of the Florida Virtual Campus in the prior fiscal year. The report shall include, but not be limited to, information related to the provision of library services and electronic resources, to include those resources licensed pursuant to s. [1006.72](#); distance learning resources; the computer-assisted student advising system; and other provided programs, activities, and services.
 - (7) All records, personnel, property, existing contracts, and unexpended balances of appropriations, allocations, grants, and other funds of the Florida Distance Learning Consortium, the Florida Center for Library Automation, the College Center for Library Automation, and FACTS.org shall be transferred to the Florida Virtual Campus. The campus shall be the successor in interest to these organizations and shall be responsible for the provision of all services as authorized by this section.

Detailed Fact Base

Strategy Detail

National Post-Secondary Online Market

Examples of Innovative Models

Florida Persistence

Florida Online Enrollments

Florida Online Programs

Florida Tuition and Fees

Florida Employment

Florida Virtual Campus

Accreditation Detail

Stakeholder Interviews

SACS Accreditation Process and Procedures

New Programs at Accredited Institutions (Strategies #1-3)

	Phase 1: SACSOC Notification and Application	Phase 2: Staff Review	Phase 3: Review and Approval by the Committee on Compliance and Reports
Overview	<ul style="list-style-type: none"> An institute undergoing substantive change must provide written notification to the President of the SACSOC A prospectus will then be requested by the SACSOC 	<ul style="list-style-type: none"> SACSOC Staff reviews the prospectus and recommends a course of action to the president of the SACSOC 	<ul style="list-style-type: none"> A committee reviews the pending prospectus and evaluates its compliance with SACSOC Academic Standards and Requirements of the Principles of Accreditation
Details	<ul style="list-style-type: none"> Prospectus must detail the rationale for change, the assessment of need, evidence of a supported plan, detailed description of the change and the required changes in faculty, school resources etc. 	<ul style="list-style-type: none"> Two recommendation paths are possible: <ul style="list-style-type: none"> Acceptance of the proposal without a site visit Referral of the proposal to the Committee on Compliance and Reports 	<ul style="list-style-type: none"> The committee may then approve the proposal with or without a site visit The committee may also elect to defer action and request additional information, or deny approval of the substantive changes
Timeline	<ul style="list-style-type: none"> Written notification must be provided six months prior to the planned implementation start date Submission of a prospectus must be completed at least three months prior to the planned implementation start date 	<ul style="list-style-type: none"> A site visit is required within six months of approved Substantive Changes by the Substantive Change Committee 	<ul style="list-style-type: none"> A site visit is required within six months of approved Substantive Changes by the Committee on Compliance and Reports
Cost	<ul style="list-style-type: none"> \$300 fee related to the review of the application/prospectus 	<ul style="list-style-type: none"> Costs and expenses associated with the visit of the Substantive Change Committee 	<ul style="list-style-type: none"> Costs and expenses associated with the visit of the Committee on Compliance and Reports

Changes requiring **both** notification of and approval by the SACSOC (as outlined above) include:

- Initiating certificate programs for workforce development or other disciplines
- Initiating distance learning or correspondence programs by which students can take at least 50% of a programs credits through delivery in a format other than face-to-face
- Expanding at the institution's current degree level
- Initiating a collaborative academic program with another institution not accredited by the SACSOC
- Initiating coursework, certificates, or programs of study at a different level than those previously approved

SACS Accreditation Process and Procedures

Collaborative Academic Arrangements (Potentially Strategies #1-3)

- Collaborative academic arrangements are agreements between institutions accredited by the Southern Association of Colleges and Schools Commission on Colleges (SACSOC) and accredited or non-accredited degree-granting institutions of higher education throughout the world for purposes of awarding academic credits and/or educational program completion credentials, e.g., certificates, diplomas, degrees or transcripts*
 --SACSOC
- Member institutions are responsible for ensuring the integrity of their accreditation and of their education programs when entering into collaborative academic arrangements

There are three key areas of responsibility when entering a collaborative agreement which must be documented in the prospectus for Application for Substantial Change:

	Ensuring the Integrity of the Collaborative Arrangements	Ensuring the Quality of the Credits Recorded on Transcripts	Ensuring Compliance with Accreditation Requirements
Details	<ul style="list-style-type: none"> Disclaimer Statement: Institutions entering agreements with non-SACSOC accredited schools must make that clear when describing their relationship with the partner program/school Institutional Names on an Academic Credential: students may receive academic credentials from the accredited institution when they receive 25% or more of credits from that institution (33% for graduate level students) 	<ul style="list-style-type: none"> In the process of evaluating, accepting, and transcribing credits awarded through collaborative academic arrangements, the Member institution must actively evaluate and monitor partner program courses to ensure compliance with The Principals of Accreditation Transcripts must also list the program / institution from which the credits were earned 	<ul style="list-style-type: none"> The accredited institution is responsible for making sure the collaborating institution meets the pertinent Accreditation Standards These include providing documentation on such areas as: academic integrity, institutional mission, faculty, learning resources, program curriculum and program length

- Collaborative academic arrangements are most often referred to as dual or joint educational programs, affiliations, partnerships, consortia agreements, and other similar terms:
 - Joint educational programs are those in which multiple intuitions confer a single program completion certificate; require both notification of and approval by the SACSOC as outlined
 - Dual degree programs are those where students study at two or more institutions and each confers its own completion; these types of programs only require detailed notification of the SACSOC

SACS Accreditation Process and Procedures

New Institution Accreditation Process (Strategy #4)

	Phase 1: Building a Foundation of Understanding	Phase 2: Initial Paper Review	Phase 3: Onsite Review by an Candidacy Committee	Phase 4: Onsite Review by an Accreditation Committee
Overview	<ul style="list-style-type: none"> Familiarization with the application process and initial compilation of the application for accreditation 	<ul style="list-style-type: none"> Review of application by commission staff and peers 	<ul style="list-style-type: none"> Commission determination of demonstrated compliance by the institution 	<ul style="list-style-type: none"> Approval by the SACSOC Accreditation Committee of an institutions Application for Accreditation Continued candidacy may be granted rather than accreditation status
Approval Process	<ul style="list-style-type: none"> Documentation of compliance with key Comprehensive Standards; includes financial audit for past three years as available, management letter and budget outline Following discussion of the analysis of the original submission, institutions are invited to submit supplementary materials to enhance narratives and documentation 	<ul style="list-style-type: none"> Staff member will review the application and provide written assessment Institution reviews application assessment and works with SACSOC staff to strengthen weaknesses in document 	<ul style="list-style-type: none"> Committee of approximately six members evaluates final application and visits campus to evaluate compliance with the key standards and requirements of accreditation After visit committee provides a report including a direct statement of compliance or non-compliance If institution is approved, candidacy is granted for 4 years 	<ul style="list-style-type: none"> Accreditation Committee Visit allows for the committee to evaluate institution compliance with the full list of Standards and Requirements Committee is made up of ~nine members with evaluators for each relevant topic (i.e., faculty qualifications, Educational programs, Library resources, and student support)
Details	<ul style="list-style-type: none"> Part A - Institutional Characteristics: Type of Control, Organizational Chart, Educational Programs detail, methods of delivery detail, Enrollment Data, Faculty qualifications and Resources Part B – Documentation of Compliance: “makes the case” for the institution by crafting a reasoned argument for compliance with all of the key issues 	<ul style="list-style-type: none"> Staff member will review the application and provide written assessment Institution reviews application assessment and works with SACSOC staff to strengthen weaknesses in document 	<ul style="list-style-type: none"> Candidacy Committee reviews <i>updated</i> application one month prior to their visit The review consists of a three day visit to campus by the Committee Prior to scheduled visits, commission posts call for third-party comments to which the institution is invited to respond 	<ul style="list-style-type: none"> Membership is granted when the approved accredited institution has been in operation i.e., has without interruption enrolled students in degree programs through at least one complete degree program cycle, and has graduated at least one class at the level of the highest degree offered by the institution prior to action of the Commission Accreditation must be confirmed 5 years after being granted initial membership

SACS Accreditation Process and Procedures

New Institution Accreditation Process (Strategy #4)

	Phase 1: Building a Foundation of Understanding	Phase 2: Initial Paper Review	Phase 3: Onsite Review by an Candidacy Committee	Phase 4: Onsite Review by an Accreditation Committee
Timeline	<ul style="list-style-type: none"> Application is submitted to SACSOC for initial analysis and evaluation six – 18 months after attending Pre-Applicant workshop 	<ul style="list-style-type: none"> One – six months depending on application weaknesses assessed by accreditation staff Additional waiting period until SACSOC Board meeting (June, December); must allow time for audit of school's most recently completed fiscal year 	<ul style="list-style-type: none"> Three – six months after approval from Candidacy Committee Three-day visit by the Candidacy Committee; Institution has 2 weeks to respond to Committee's assessment 	<ul style="list-style-type: none"> Within six months of being granted Candidacy, visit from SACSOC Representative to consult on preparation for full Compliance Certification Within 18 months of being granted Candidacy, visit from Accreditation Committee; review of final compliance documents begins a month before the Committee visit An institution that has been granted Continued Candidacy will have a second visit from the Accreditation Committee within 18 months of Board Action
Best Practices	<ul style="list-style-type: none"> Most applicants establish a Leadership Team to manage and validate the internal institutional assessment of Compliance; President / CEO has overall responsibility and sits on the Leadership Team The higher the level of detail in the application the better – the links between key issues of compliance and the narrative in Part B is of high importance 	<ul style="list-style-type: none"> As possible, the application narrative should be as developed <i>prior</i> to submission to the SACSOC After review and analysis by accreditation staff, effort should be paid to ensuring the application is corrected and is free from weaknesses, is articulate, persuasive and provides compelling evidence of compliance 	<ul style="list-style-type: none"> High levels of preparation and precise execution of scheduled events are highly encouraged – the visit is a chance for the institution to make a strong impression to the members of the committee 	<ul style="list-style-type: none"> Because the analysis for compliance covers more than twice the number of key issues, schools may elect to expand their Leadership Team to cover the increased workload and demand for expertise Staff advisory visit can be scheduled to match the institutions preference – earlier allows staff to provide guidance to tasks before they are tackled, later allows for feedback on preliminary work
Cost	<ul style="list-style-type: none"> Costs and expenses associated with the preparation and submission of an application 	<ul style="list-style-type: none"> \$10,000 Application Fee 	<ul style="list-style-type: none"> \$2,500 Candidacy Fee Costs and expenses associated with the visit of the Candidacy Committee 	<ul style="list-style-type: none"> Costs and expenses associated with the visit of the Accreditation Committee

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National Post-Secondary Online Market

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Florida Virtual Campus

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Stakeholder Interviews

Stakeholder Interviews

Primary Research

Primary Research

Stakeholder Interviews

- Dr. Judy Ashcroft – former Dean, University College, USF
- Frances Butler – Legislative Analyst, Florida House of Representatives
- Ruth Ann Balla – Executive Director of the Virtual College, Miami Dade College
- Dr. Bob Bradley – Vice President for Planning and Programs, FSU
- Dave Brill – FL Blue Ribbon Task Force on Higher Education
- Frank Brogan – Chancellor, State University System (SUS)
- Matt Carter – Board of Governors, SUS
- Dr. Tom Cavanagh – Assistant Vice President, Center for Distributed Learning, UCF
- Dr. Bruce Chaloux – CEO, Sloan Consortium; former manager (and creator) of SREB's Electronic Campus
- Dr. Manoj Chopra – Board of Governors, SUS
- Dr. Kathy Cobb – Brevard Community College
- Lynn Cobb – House Deputy Chief of Staff for Policy
- Dean Colson – Chair, Board of Governors, SUS
- Jamelle Connor – AVP, St. Petersburg College
- Sherri Croom – Governor's Office
- John Delaney – Chair, Council of Presidents, President, UNF
- Dr. Cathy Duff – Interim Associate Provost and Associate Vice President, FGCU
- Ann Duncan – President, Vertical Integration
- Dr. Jose Fierro – Dean, Open Campus, Florida State College at Jacksonville
- Dr. Frank Fuller – Florida Senate
- Dr. Myk Garn – Director of the SREB Educational Technology Cooperative
- Rob Gidel – Chair, Board of Trustees, FL Polytechnic University
- Dr. Joe Glover – Provost and Senior Vice President for Academic Affairs, UF
- Randy Hanna – Chancellor, Florida College System
- Tom Hamby – Florida House of Representatives
- Kristie Harris – Budget Director, FL Board of Governors
- Dr. Joel Hartman – Vice Provost and CIO, UCF
- Jane Hayes – Interim Executive Director, Florida Virtual Campus
- Allyce Heflin – Budget Chief, Florida House of Representatives
- Matt Hintze – TutoringZone
- Jan Ignash – Vice Chancellor for Academic and Student Affairs, SUS
- Michael Johnson – Southern Association of Colleges and Schools
- Jason Jones – Director, Institutional Research, SUS
- Dr. Art Kirk – President, St. Leo
- Dr. Scott Kittel – former Education Policy Coordinator, Office of the Governor
- Theresa Klebacha – Staff Director, Education Committee, Florida Senate
- Jana Kooi – President, Open Campus, Florida State College at Jacksonville
- Gene Kovacs – Assistant Vice Chancellor, Information Resource Management, SUS
- Dr. R.E. LeMon – Assoc. Vice Chancellor, Academic and Student Affairs, SUS
- Dr. Andy McCollough – Assoc. Provost for Teaching and Technology, UF
- Dr. Nancy McKee – Assoc. Vice Chancellor, Academic and Student Affairs, SUS
- Kathy Mears – Chief of Staff to Speaker-designate Will Weatherford
- Dr. Ed Moore – President, Independent Colleges and Universities of Florida
- Dr. Pam Northrup – Dean, Associate Provost and Dean of the College of Professional Studies, UWF
- Dr. James Olliver, St. Petersburg College
- Dr. John Opper – Director, Distance Learning, Florida Virtual Campus
- Dr. Monica Orozco – Assistant Provost for eLearning, FAU
- Denise Potvin – Budget Chief, Florida House of Representatives
- Joseph Riquelme – Director, FIU Online
- Dr. Len Roberson – Graduate Dean and Assistant VP for Academic Technology, UNF
- Andrew Rosen – CEO, Kaplan
- Mark Rosenberg – President, FIU
- Dr. Susann Rudasill – Director, Office of Distance Learning, FSU
- Dr. Heather Sherry – Policy Chief, Florida House of Representatives
- Dr. David Shulman – Associate Vice President Online & Instructional Technology, Broward College
- Roary Snider – Policy Chief, Office of the Governor
- Dr. Dave Spence – President, Southern Regional Education Board (SREB)
- Richard Stevens – Director, Academic and Student Affairs, SUS
- Dr. Ron Toll – Provost, Florida Gulf Coast University, representing Council of Academic Vice Presidents
- Dr. Eddie Wachter – DeVry University, Orlando Office
- Dr. Douglas Wartzok – Provost and Executive Vice President, FIU
- Will Weatherford – House Speaker Designee
- Vicki Westergard – Executive Director, eCampus, Web and Instructional Technology, St. Petersburg College
- Cortez Whatley – Florida Student Association, Chair, and Member, Board of Governors